



ANNUAL Report2021



wisconsin
philanthropy
network

Your partner for effective giving



Dear Partner in Philanthropy:

Brainstorming, thinking outside of the box, and attempting to solve state, national & global challenges is hard work. Please take a few moments to celebrate our collective accomplishments from 2021.

Wisconsin Philanthropy Network, (WPN) exceeded organizational goals by engaging with members over 3500 times in a series of issue-based programs, philanthropic discussions, one-on-one meetings and regional convenings. Together, we embraced being virtual and engaged in thought provoking conversations at our flagship Statewide Conference on Philanthropy.

We continued our work to enhance our member communications, develop infrastructure to better understand and relay national trends, cultivate relationships with community-based stakeholders, and convene members throughout the state including the launch of a rural funders roundtable.

In partnership with members, we launched new efforts to address equity, trust-based philanthropy, and impact investing. A common request from members was wanting guidance and tools to help navigate philanthropic discussions with an emphasis on equitable and inclusive practices. We answered the call by participating in a national equity fellowship, enhancing and distributing our Racial Equity Resource Guide, developing shared language among coalitions, gathering and reporting on data from the equity journey of members and cultivating board engagement.

In 2021, our geographic diversity grew and extended across the state as we welcomed 14 new members and achieved an 85% renewal rate for membership. Our first ever virtual Statewide Conference on Philanthropy was a resounding success. Conference content was curated based upon member input. Themes included lifting community voice, digital equity, community-driven philanthropy, equity in philanthropy, housing, impact investing and rural philanthropy. Our biennial conference is a forum for action-oriented discussions; providing tools and best practice research; exploring and promoting trust-based approaches in philanthropy; and encouraging cross-regional sharing of ideas and collaboration.

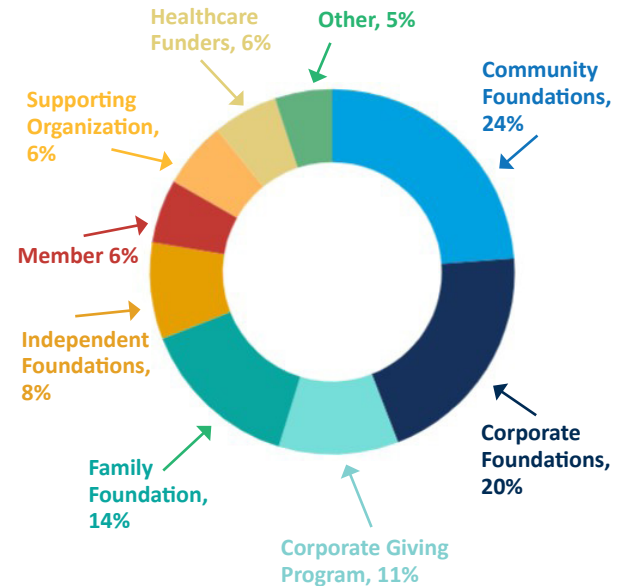
Being Wisconsin's premier philanthropic resource is humbling and requires an openness to innovation and new ways of thinking. We are grateful to all of you—our members for your ideas, rigorous debate, leadership, knowledge and participation in programming.

Thank you for a fabulous year of growing together,

Tony Shields
President and CEO

Kathryn Leverenz
Board Chair

Membership Composition



85% Member Retention Rate!



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



WPN'S MISSION IS TO ADVANCE EFFECTIVE PHILANTHROPY

Strategic Planning/Organization Vision:

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

Programming and Professional Development:

Enhanced programming and professional development through virtual offerings, increasing access and creating statewide forums.

Member Engagement:

WPN efforts resulted in more than 3,500 member touches through various activities, individual meetings, research, convenings and communication channels.

Community Engagement:

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 philanthropy in Wisconsin and the Wisconsin Gives Report.

2021 Wisconsin Statewide Conference:

Developed, executed and promoted the Annual Statewide Conference on Philanthropy, assuring alignment with WPN's strategic direction and set the stage for future programming in 2022 and beyond. More than 325 attendees participated in the conference.

Enhanced Roundtables:

WPN's virtual roundtables in 2021 offered opportunities for funders to connect and learn from one another by functional areas and geographic focus. This was especially beneficial for funders supporting Rural Philanthropy and communities throughout the state.

National Philanthropic Trends:

Intentionally engaged with national philanthropic influencers to keep members informed on key issues.

MEMBER FEEDBACK

91% remain members so they can **NETWORK AND LEARN FROM OTHERS** in the field.

98% remain members so they can be part of the **ONLY PHILANTHROPIC MEMBERSHIP ASSOCIATION IN WISCONSIN**.

96% remain members so they can participate in **STRENGTHENING, PROMOTING, AND ADVANCING THE FIELD**.

Members feel that WPN is worth the investment:

94% for myself

94% for my organization

100% for the good of the field

2021 WPN FINANCIALS

FINANCIAL OVERVIEW

TOTAL ASSETS.....\$894,082
TOTAL LIABILITIES.....\$155,893
WITHOUT DONOR RESTRICTION.\$224,012
WITH DONOR RESTRICTION.....\$514,177
CASH AND CASH EQUIVALENTS...\$642,249

SOURCE OF FUNDS

MEMBERSHIP DUES.....49.9%
GRANTS & DONATIONS.....30%
SPONSORSHIPS.....9.8%
PROGRAM REVENUE.....10%
PROGRAM-RELATED REVENUE.6%

Total Revenue:
\$747,737

USE OF FUNDS

SALARIES/FRINGE.....48%
PROGRAMS/MARKETING.....38%
OUTSIDE SERVICES.....8%
RESEARCH.....2%
BUILDING/OCCUPANCY.....4%

Total Expenses:
\$735,678

2020 CHALLENGES & CHANGES

Wisconsin, like the rest of the world, continued to be challenged and changed by the pandemic. The global pandemic disrupted economies and daily life as it amplified basic needs, health inequities, and racial disparities across Wisconsin communities. Philanthropy responded with generosity. Last year, WPN was especially proud to support the state's philanthropic sector with strategic efforts to advance effective philanthropy.

WPN VIRTUAL PROGRAMMING

To ensure the safety of members, stakeholders, and staff, WPN continued programming in a virtual format. This provides members with unprecedented access to programs addressing important philanthropic issues like equity, and impact investing; the impact of COVID-19 on non profits; and trust-based philanthropy. This pivot resulted in unexpected improvements like increasing access, creating statewide forums, and shrinking silos.

RESEARCH

In 2021, a total of 152 research requests were performed for WPN members, amounting to 148.75 hours of staff time and costs associated with accessing data, publications, and reports.

Research included: charity check reports, compensation information, job descriptions, grant management software, policies on communication, and more. Last year, WPN also created and compiled resources on our website, including information about Equity and Impact Investing.

PROGRAMMING & NETWORKING

3500

PHILANTHROPIC STAKEHOLDERS:

ENGAGED IN PROGRAMS, ROUNDTABLES, AND PROFESSIONAL DEVELOPMENT OPPORTUNITIES

46

PROGRAMS:

INCLUDING 20 ROUNDTABLES AND 11 ISSUE-BASED PROGRAMS, EXPLORED IMPORTANT PHILANTHROPIC ISSUES AND BEST PRACTICES.

**Welcome
to Our New
2021 Members!**

Anon Charitable Trust
Cardinal Stritch University
Catholic Community Foundation
Dohmen Company Foundation
Jefferson Community Foundation
Jim Marks
M3 Insurance

Riverwater Partners
SPL Legacy Foundation
The Needmor Fund
United Performing Arts Fund (UPAF)
WEA Member Benefits Foundation
Wisconsin Humanities Council
Wispect Foundation

2021 WPN Members:

A.O. Smith Foundation	Kohler Foundation, Inc.
Advancing a Healthier Wisconsin	Komatsu Mining Corp. Group
Alliant Energy Foundation	Lee Gentine Family Foundation
American Family Insurance Dreams Foundation	Madison Community Foundation
Argosy Foundation	Mark and Sally Egan Foundation, Inc.
Ascendium Education Group	Marshfield Area Community Foundation
Associated Bank Community Accountability	Marybeth Budisch
Bader Philanthropies, Inc.	MATC Foundation
Badger Meter Foundation	Mathematics Institute of Wisconsin
Baird Foundation, Inc.	National Guardian Life Insurance Group
Brewers Community Foundation	Nimick Forbesway Foundation
Carmen Witt	Nonprofit Management Fund
Carthage College	Northwestern Mutual Foundation
Charles D. Jacobus Family Foundation	Old National Bank
Charles E. Benidt Foundation, Inc.	Oshkosh Area Community Foundation
Children's Hospital of Wisconsin Foundation	Prairie Springs: The Paul Fleckenstein Trust
City Forward Collective	R.A. Stevens Foundation
Community Foundation for the Fox Valley Region	Racine Community Foundation
Community Foundation of Central Wisconsin	Rexnord Foundation, Inc.
Community Foundation of Chippewa County, Inc.	Rockwell Automation
Community Foundation of North Central Wisconsin	Roots and Wings Foundation
Community Foundation of South Central Wisconsin, Inc.	Rusk County Community Foundation
Community Foundation of Southern Wisconsin	Schlecht Family Foundation
CUNA Mutual Group Foundation	Scott Gelzer
Daniel Hoan Foundation, Inc.	Siebert Lutheran Foundation, Inc.
Daniel M. Soref Charitable Trust	SSM Health
Direct Supply	Suzanne & Richard Pieper Family Foundation
Eau Claire Community Foundation	SVA Accounting
Foley & Lardner LLP	TASC
Fond du Lac Area Foundation	The Catholic Community Foundation
Fort Atkinson Community Foundation	The Jane Bradley Pettit Foundation, Inc.
Forward Community Investments	The Johnson Foundation at Wingspread
Gateway Technical College Foundation	The Lynde and Harry Bradley Foundation
Gil Llanas	The Richard & Ethel Herzfeld Foundation
Greater Green Bay Community Foundation	Theodore W. Batterman Family Foundation
Greater Milwaukee Foundation	Tim Size
Greater Watertown Community Health Foundation	United Church of Christ (UCC) Foundation
Harry G. & Charlotte H. Slater Family Fund, of The	United Way of Dane County
Greater Milwaukee Foundation	United Way of Greater Milwaukee & Waukesha County
Heil Family Foundation	United Way of Wisconsin
Herb Kohl Philanthropies	UnityPoint Health - Meriter
Hugh J. Andersen Foundation	University of Wisconsin La Crosse Foundation
Jewish Community Foundation of the Milwaukee Jewish	UW Health & Quartz
Federation	Vine & Branches Foundation, Inc.
Johnson Controls, Inc.	Waukesha County Community Foundation
Joseph and Vera Zilber Charitable Foundation	WHEDA Foundation
Kaztex Foundation	Wisconsin Medical Society Foundation
Kelben Foundation	Wisconsin Partnership Program
Kohler Foundation, Inc.	Wisconsin Trust Account Foundation, Inc.
	Wisconsin Trust Account Foundation, Inc. (WisTAF)
	Wisconsin Women's Business Initiative (WWBIC)
	Women's Fund of Greater Milwaukee

WPN BOARD of Directors

Board Officers

Kathryn Leverenz, Chair
Mathematics Institute of Wisconsin

Erin Frederick, Secretary
Zilber Family Foundation

Ken Robertson, Treasurer
Greater Milwaukee Foundation

Julie Bauer, Secretary
Alliant Energy Foundation

Board Members

Melissa Baxter
Waukesha County Community Foundation

Patricia Contreras
Rockwell Automation

Frank Cumberbatch
Bader Philanthropies, Inc.

Curt Detjen
Community Foundation for the Fox Valley Region

Christina Ellis
Advancing a Healthier Wisconsin

Amy Kerwin
Ascendium Education Group

Jason Kohout
Foley & Lardner LLP

Maggie Pascaly
American Family Insurance Dreams Foundation

Stephanie Schlecht
Schlecht Family Foundation

Alexzandra Shade
CUNA Mutual Group

SPECIAL THANKS TO OUR 2021 BENEFACTORS AND SPONSORS:

GRANTS & SPONSORSHIPS

\$25,000 AND ABOVE

Daniel M. Soref
Charitable Trust
Rockwell Automation

\$5,000 - \$9,999

Alliant Energy Foundation
Bader Philanthropies, Inc.
Unite Us

\$1-\$4,999

Catchafire
Charles D. Jacobus Family
Foundation
Community Foundation for
the Fox Valley Region
Community Foundation of
North Central Wisconsin
Crescendo Interactive
CUNA Mutual Group
Foley & Lardner LLP
Herb Kohl Philanthropies
Madison Community
Foundation
Mathematics Institute
of Wisconsin
Medical College of WI

\$10,000 - \$24,999

American Family Dreams
Foundation
Ascendium Education
Group
Joseph and Vera Zilber
Charitable Foundation
Siebert Lutheran
Foundation

National Guardian
Life Ins Group
Northwestern Mutual
Foundation
Racine Community Foundation
Scott Gelzer
Strobel and Hanson
SVA
United Philanthropy Forum
UnityPoint Health - Meriter
UpMetrics
UW Health & Quartz
Wheda
Wisconsin Impact Investing
United Philanthropy Forum

WISCONSIN LEADERSHIP DEVELOPMENT (WILD):

Brico Fund
Greater Milwaukee Foundation
Movement Voter Project
Tides Foundation

IMPACT INVESTING

Alliant Energy Foundation	Forward Community
Bader Philanthropies	Investments
Greater Milwaukee	Encourage Community
Foundation	Foundation
Kids Forward	Schlecht Family Foundation