



wisconsin
philanthropy
network

Your partner for effective giving

2020 ANNUAL REPORT



Dear Partner in Philanthropy:

Without question, 2020 was a year like no other. The COVID-19 pandemic challenged our organizations, partnerships, and personal lives. In addition, regional and national events shined a bright light on racial and social justice issues in communities throughout Wisconsin and the world. WPN was honored and humbled by requests for us to play a lead role in supporting and strengthening philanthropy's response to the crises of 2020.

At the outset of COVID stay-at-home orders in March of 2020, WPN's Board of Directors discussed the opportunity we had to lead critical conversations about philanthropy's response to the global pandemic. While many organizations suffered significant disruption, WPN was able to adapt and leverage the opportunities of a virtual environment. Moving programming online allowed us to offer safe spaces for critical conversations when we needed people to come together to problem solve, share best practices, and connect.

Last year, we brought together 820 philanthropic leaders from across the state to participate in virtual programs, events, issue-based convenings, round table discussions and Grantmaker Boot Camp. These conversations forged new connections, blurred regional lines, and brought knowledge about national trends, effective practices, and challenges in disaster philanthropy, public health, equity, and more. Embracing virtual events allowed us to experience record growth in program attendance --something we will continue to embrace going forward.

Peer to peer conversations also fast-tracked partnerships and shared goals. WPN's signature 2020 Wisconsin Gives Report shared the ways in which philanthropy across the state marshaled resources to meet unprecedented needs in urban, rural, and suburban communities.

As we look to the future in this ever-changing world, we promise to uphold our commitment to valuing philanthropy, inspiring and providing the best education to our philanthropic leaders, and convening diverse groups to make positive change both locally and nationally.

The world is full of problems. We appreciate how much each of you and your organizations' care about the issues facing our communities. We thank you for your leadership, generosity and tireless dedication to seeing opportunities where problems exist. Finally, we applaud your efforts to motivate other leaders and businesses to join our work.

In partnership,



Tony Shields
President and CEO

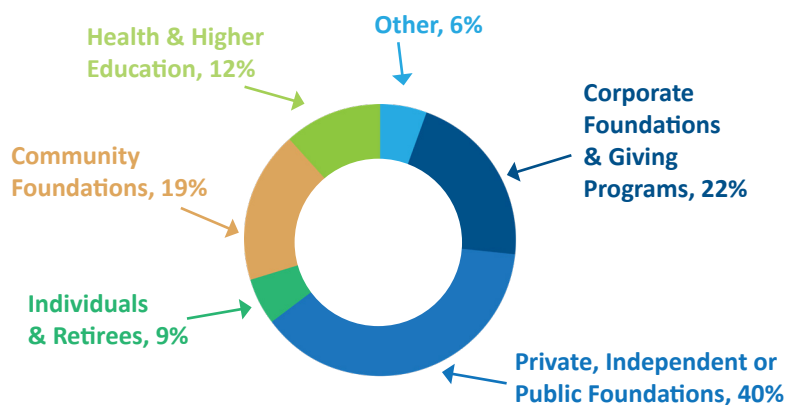


Kathryn Leverenz
Board Chair

Welcome to Our New 2020 Members!

Alice C. Holton Family Foundation
Associated Bank
Lee Gentine Family Foundation
Nonprofit Management Fund
Otto Bremer Trust
Roots & Wings Foundation
SVA Accounting
Tim Size
United Church of Christ Foundation
Wisconsin Economic Development Association (WEDA)
Wisconsin Medical Society Foundation
Wisconsin Women's Business Initiative Corp. (WWBIC)
Wisconsin Trust Account Foundation (WisTAF)

Membership Composition



83% 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.



2020 WPN ACCOMPLISHMENTS

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, plan and execution of key activities to support the mission off WPN.

Programming and Professional Development:

Pivoted programming and professional development to virtual offerings, increasing access, creating statewide forums and shrinking silos.

Member Engagement:

WPN efforts resulted in more than 3,100 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 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.

2020 Wisconsin Gives Report:

Produced and disseminated WPN's signature *2020 Wisconsin Gives Report, Philanthropy Rising: Responding to Pressing Challenges & Reimagining Futures*. The report explored how philanthropy responded to challenges in 2020 through a survey of Wisconsin Grantmakers and compilation of national studies and sources. Gives plays an important role in keeping stakeholders informed about the state of philanthropy in Wisconsin.

Enhanced Roundtables:

WPN's virtual roundtables in 2020 offered opportunities for funders to connect and learn from one another by functional area (Education and Corporate Community) and geographic focus (Dane County and Northeast Wisconsin). This was especially beneficial for funders located outside of Wisconsin who supported communities within the dairy state.

Enhanced Member Communications:

Throughout 2020, WPN shared news and information with members more frequently.

National Philanthropic Trends:

Intentionally engaged with national philanthropic influences to keep members informed of key issues.

MEMBER FEEDBACK

96%

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

95%

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:

93%

for myself

95%

for my organization

98%

for the good of the field

2020 WPN FINANCIALS

FINANCIAL OVERVIEW

TOTAL ASSETS.....\$865,348
TOTAL LIABILITIES.....\$139,218
WITHOUT DONOR RESTRICTION.\$234,328
WITH DONOR RESTRICTION.....\$491,802
CASH AND CASH EQUIVALENTS...\$676,671

SOURCE OF FUNDS

MEMBERSHIP DUES.....25%
GRANTS & DONATIONS.....65%
SPONSORSHIPS.....3%
PROGRAM REVENUE.....3%
PROGRAM-RELATED REVENUE.4%

Total Revenue:
\$986,895

USE OF FUNDS

SALARIES/FRINGE.....48%
PROGRAMS/MARKETING.....39%
OUTSIDE SERVICES.....7%
RESEARCH.....2%
BUILDING/OCCUPANCY.....4%

Total Expenses:
\$767,115



2020 AREAS OF FOCUS

2020 CHALLENGES & CHANGES

Wisconsin, like the rest of the world, was challenged and changed by the crises of 2020. 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 quickly adapted programming to virtual formats. This provided members with unprecedented access to programs addressing important philanthropic issues like diversity, equity, and inclusion; the impact of COVID-19 on philanthropy; and trust-based philanthropy. This pivot resulted in unexpected improvements like increasing access, creating statewide forums, and shrinking silos.

PROGRAMMING & NETWORKING

820

PHILANTHROPIC STAKEHOLDERS:
Engaged-IN PROGRAMS,
ROUNDTABLES, AND PROFESSIONAL
DEVELOPMENT OPPORTUNITIES

43

VIRTUAL PROGRAMS: INCLUDING
20 ROUNDTABLES AND 11 ISSUE-BASED
PROGRAMS, EXPLORED IMPORTANT
PHILANTHROPIC ISSUES AND BEST
PRACTICES, LIKE DISASTER PHILANTHROPY

2020 WISCONSIN GIVES REPORT

WPN's signature [*2020 Wisconsin Gives Report, Philanthropy Rising: Responding to Pressing Challenges & Reimagining Futures*](#) explored philanthropic giving like never before. It compiled information from numerous national studies along with a survey of grantmaker's across the state in the summer of 2020 to inform understanding about the state of Wisconsin's philanthropic sector. Key findings included:

- Nearly half of WPN survey respondents planned to increase grantmaking in 2020
- 64% of WPN survey respondents who were increasing grants directed them to respond to COVID-19
- 39% of WPN survey respondents directed grants to general operations
- 60% of WPN survey respondents directed funds to address racial equity

RESEARCH

In 2020, a total of 146 research requests were performed for WPN members, amounting to 136.75 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 COVID-19 resources on its website, including information about emergency fund programs across the state as well as federal resources available to the sector, like the Payroll Protection Program (PPP).

PHILANTHROPIC SHIFTS

To respond to the challenges brought by the global pandemic, Grantmakers across Wisconsin (and beyond) adapted grantmaking practices. Many provided greater flexibility than ever before: Allowing goals of current grants to shift; providing flexible reporting requirements; converting restricted grants to unrestricted; increasing the size of current grants or providing supplemental grants; and accelerating payment schedules.

Some funders are considering making such changes permanent. As philanthropy shifts, WPN will continue to support generosity, giving, and Wisconsin's culture of philanthropy.



2020 WPN Members:

Community Foundations

Community Foundation for the Fox Valley
Region
Community Foundation of Central WI
Community Foundation of Chippewa County
Community Foundation of North Central WI
Community Foundation of South Central WI
Community Foundation of Southern WI
Duluth Superior Area Community Foundation
Eau Claire Community Foundation
Fond du Lac Area Foundation
Fort Atkinson Community Foundation
Greater Green Bay Community Foundation
Greater Milwaukee Foundation
Incourage
Madison Community Foundation
Marshfield Area Community Foundation
Oshkosh Area Community Foundation
Racine Community Foundation
Rusk County Community Foundation
Staseline Community Foundation
Waukesha County Community Foundation

Corporate Foundations/Giving Programs

A.O. Smith Foundation
Alliant Energy Foundation
American Family Insurance Dreams Foundation
Ascendium Education Group
Associated Bank
Badger Meter Foundation
Baird Foundation, Inc.
CUNA Mutual Group Foundation
Direct Supply Foundation
Foley & Lardner LLP
Inspiring Community, Inc.
Johnson Controls, Inc.
Komatsu Mining
Midwest Asset Management
Milwaukee Bucks Foundation
National Guardian Life Insurance Group
Northwestern Mutual Foundation
Old National Bank
Otto Bremer Trust
Rexnord Foundation, Inc.
Rockwell Automation
SVA Accounting
Total Administrative Services Corporation (TASC)

Donor-Advised Funds

Fund for Lake Michigan
Harry G. & Charlotte H. Slater Family Fund
of the Greater Milwaukee Foundation
Non-profit Management Fund

Family, Independent or Public Foundations

Alice C. Holton Family Foundation
Argosy Foundation
Bader Philanthropies, Inc.
Charles D. Jacobus Family Foundation
Charles E. Benidt Foundation, Inc.
City Forward Collective
Cream City Foundation
Daniel Hoan Foundation, Inc.
Daniel M. Soref Charitable Trust
Elizabeth Elser Doolittle Charitable Trusts
Evan and Marion Helfaer Foundation
Forward Community Investments
Heil Family Foundation
Herb Kohl Philanthropies
Hugh J. Andersen Foundation
Kaztex Foundation
Kelben Foundation
Kern Family Foundation, Inc.
Kohler Foundation, Inc.
Lee Gentine Family Foundation
Mark & Sally Egan Foundation
Prairie Springs: The Paul Fleckenstein Trust
R A Stevens Foundation
Roots and Wings Foundation
Schlecht Family Foundation
Siebert Lutheran Foundation, Inc.
Suzanne & Richard Pieper Family Foundation
The Brookby Foundation
The Jane Bradley Pettit Foundation, Inc.
The Lynde and Harry Bradley Foundation
Theodore W. Batterman Family Foundation
United Church of Christ Foundation
Vine & Branches Foundation, Inc.
WEDA Foundation
WHEDA Foundation
Wisconsin Trust Account Foundation, Inc.
(WisTAF)
Wisconsin Women's Business Initiative
Corporation (WWBIC)
Women's Fund of Greater Milwaukee
Joseph and Vera Zilber Charitable Foundation

Federated Funds

Jewish Community Foundation
United Way of Dane County
United Way of Greater Milwaukee &
Waukesha County
United Way of Wisconsin

Healthcare Foundations

Advancing a Healthier Wisconsin
Children's Hospital of Wisconsin
Greater Watertown Community Health
Foundation
SSM Health
UW Health & Quartz
Wisconsin Medical Society Foundation
Wisconsin Partnership Program

Higher Education Foundations

Carroll University
Carthage College
Gateway Technical College Foundation
Milwaukee Area Technical College Foundation
UW La Crosse Foundation

Individual Philanthropists

Barry Mandel
Tim and Pat Size

Operating Foundations

Mathematics Institute of Wisconsin
Waukesha Education Foundation

Retirees

Marybeth Budisch
Scott Gelzer
Steve Goldberg
Gil Llanas
Carmen Witt

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 Education Foundation

Patricia Contreras
Rockwell Automation

Frank Cumberbatch
Bader Philanthropies

Curt Detjen
Community Foundation for the Fox Valley Region

Christina Ellis
Advancing a Healthier Wisconsin Endowment

Steve Goldberg
WEA Member Benefits Foundation

Amy Kerwin
Ascendium Education Group

Jason Kohout
Foley & Lardner LLP

Bob Sorge
Madison Community Foundation

SPECIAL THANKS TO OUR 2020 BENEFACTORS AND SPONSORS:

Grants & Sponsorships

\$25,000 AND ABOVE

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

\$10,000 - \$24,999

Rockwell Automation
Siebert Lutheran Foundation
Zilber Family Foundation

\$5,000 - \$9,999

Mathematics Institute of Wisconsin

\$1-\$4,999

AFP Madison Chapter
AFP SE Wisconsin Chapter
Alliant Energy Foundation
Ascendium Education Group
Charles D. Jacobus Family Foundation
Community Foundation for the Fox Valley Region
Community Foundation of North Central Wisconsin
CUNA Mutual Group
Foley & Lardner LLP
Greater Green Bay Community Foundation
Helen Bader Institute
Madison Community Foundation
Northwestern Mutual Foundation
Racine Community Foundation

WISCONSIN LEADERSHIP DEVELOPMENT (WiLD):

Brico Fund
Greater Milwaukee Foundation
Movement Voter Project
Tides Foundation
Zilber Family Foundation



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