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

Kathyrn Leverenz
Board Chair

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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)

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Membership Composition

- Corporate Foundations & Giving Programs, 22%
- Private, Independent or Public Foundations, 40%
- Community Foundations, 19%
- Individuals & Retirees, 9%
- Health & Higher Education, 12%
- Other, 6%

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 of 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 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.

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

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

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<tr>
<th>PHILANTHROPIC STAKEHOLDERS: Engaged-in Programs, Roundtables, and Professional Development Opportunities</th>
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<th>VIRTUAL PROGRAMS: Including 20 Roundtables and 11 Issue-Based Programs, Explored Important Philanthropic Issues and Best Practices, Like Disaster Philanthropy</th>
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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.
**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
- Stateline 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
- Ketzex 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. Batten 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

**As of: December 2020**

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**2020 WPN Members:**
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