

2022

Wisconsin Gives Report



wisconsin
philanthropy
network

Your partner for effective giving

A MESSAGE FROM THE PRESIDENT AND CEO

Welcome to the 2022 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.

I am excited to announce that our data-gathering partner for this year's report is Co-Create, an initiative of The Center for Community & Nonprofit Studies (the CommNS) at the University of Wisconsin-Madison. CommNS is a hub for faculty, students, and community partners to collaborate on research, practice, and evaluation that examines the well-being of communities and the civic and nonprofit sectors.



While statewide philanthropy continues to be a source of great inspiration and hope in meeting human needs, there are still many challenges facing our communities. The impact of COVID-19 and of racial and social justice issues on communities continues to be an area of focus both in Wisconsin and nationally.

WPN's 2022 Wisconsin Gives Report explores the significant role philanthropy plays in responding to pressing challenges. This report provides critical information about statewide charitable giving, national trends, and sector specific analysis, including philanthropy in response to emerging issues in our communities. The report highlights insights vital to informing and advancing effective philanthropy in Wisconsin.

Within this report you will find an analysis of survey results from grantmakers across Wisconsin, including a timely assessment of how funders are responding to 2022 issues and how effective and strategic grantmaking can help to source solutions. In addition, data has been compiled from numerous national studies and sources.

Narrative stories are also an important part of the report. Statewide and national philanthropic stakeholders have contributed articles to deepen understanding about best practice in grantmaking and collaboration. Member Spotlights, interspersed throughout this report, feature best practices from some of our most valuable partners.

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.

The WPN team continues to be so honored 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, sharing best practice, and ensuring our communities continue to thrive even under challenging times.



Tony Shields, President & CEO

OVERALL KEY FINDINGS

- ▶ Foundations in Wisconsin invested over \$797 million to support organizations statewide in 2021.
- ▶ Nonprofit employment accounted for 13% of Wisconsin's total workforce in 2021 with non-officer annual salaries and wages totaling \$14.2 billion.
- ▶ COVID-19 continues to impact nonprofit organizations worldwide.
- ▶ Grantmakers in Wisconsin are responding by supporting organizations working to combat ongoing health and broader economic impacts of the virus.
- ▶ 57% of WPN Grantmaker Survey Respondents confirm they're practicing Trust-Based Philanthropy in some capacity with 31% reporting being in the process of learning more.
- ▶ Grantmakers are increasing their support for Racial Justice work in Wisconsin – 45% of WPN Grantmaker Survey Respondents report increasing support for organizations serving BIPOC communities in 2021.
- ▶ Capacity Building is of significant interest to funders in Wisconsin with 70% of WPN Capacity Building Survey Respondents indicating interest in engaging in further discussion with other funders on this topic. Opportunities to explore collaborative funding is also of significant interest to grantmakers in the state.

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OUR PARTNER IN CREATING THE 2022 WISCONSIN GIVES REPORT



The Center for Community & Nonprofit Studies (the CommNS) at the University of Wisconsin-Madison is a hub for faculty, students, and community partners to collaborate on research, practice, and evaluation that examines the well-being of communities and the civic and nonprofit sectors.

Co-Create is an initiative of the CommNS that offers services to nonprofit organizations and other mission-driven groups that meet their unique needs for advancing social change. Co-Create brings to the table the full assets of engaged research, including knowledge and synthesis of current research on important community and nonprofit issues; a broad range of methods in data collection, analysis, and participatory research and evaluation; skills in strategic planning, program design, and group process; and connections to university experts and opportunities.

Co-Create is led by Amy Washbush, PhD, CommNS Associate Director for Engaged Research, an experienced program evaluator and community-based researcher with experience partnering with nonprofit and community organizations, government agencies, funders, and others in projects across the social sector.

For the 2022 Wisconsin Gives report, the Co-Create team selected and summarized data (from sources like Giving USA, the Foundation Information Center, and the County Health Rankings), prepared feature articles, and provided other support to WPN. <https://commnsknowledge.wisc.edu>

MATHEMATICS INSTITUTE: SURGE IN DEMAND FOR SERVICES



The Mathematics Institute of Wisconsin is experiencing a surge in demand for services as schools grapple with “unfinished learning of students” brought on by the COVID-19 pandemic.

For the 2022-2023 academic year, the organization has brought on several consultants to meet demand from schools requesting professional development for coaches, teachers, and administrators as they deal with the monumental task of addressing the “missed learning” created by the pandemic.

National test results from the National Assessment of Educational Progress, (NAEP), released in September of 2022, show this year, for the first time since NAEP began tracking student achievement in the 1970s, 9-year-olds lost ground in math, and scores in reading fell by the largest margin in more than 30 years. The declines spanned almost all races and income levels and were markedly worse for the lowest-performing students. While top performers in the 90th percentile showed a modest drop — three points in math — students in the bottom 10th percentile dropped by 12 points in math, four times the impact.

Kathryn Leverenz, President of the Math Institute said, “All Wisconsinites need to face some facts, 1) students at high-poverty schools were hit hardest, 2) students learned less when they were remote and 3) that gaps exist from county to county depending on the amount of time students were virtual.”

While the recent media attention on the decrease in student achievement via test scores can leave both educators and administrators on the defensive, there is an opportunity for philanthropists to step up to help districts not only catch students up from the pandemic, but also tackle long-standing historical inequities in education. Leverenz added, “Right now I’d say our biggest focus at the Math Institute is getting schools to adopt high quality instructional materials, which means a standards aligned curriculum that focuses on grade-level material.” Wisconsin is not a state that adopts a math curriculum for the entire state, so quality of curriculum can vary greatly.

**MEMBER
SPOTLIGHT**

COVID-19: TWO YEARS INTO THE PANDEMIC

Despite some recovery from the early months of the pandemic, total employment in Wisconsin was still down by 69,428 jobs (2.4%) in December 2021 relative to December 2019. The educational services sector has declined to 3.8% below the December 2019 level and the health care and social assistance job sector has declined 3.9%.

Wisconsin ranks 43rd nationally in American Rescue Plan Act (ARPA) funds received as a share of direct general expenditures, receiving \$4.86 billion in fiscal recovery funds, which equates to 8.7% of annual state and local spending and is trailing the national average of 9.7%.

COVID-19 IMPACT ON THE NONPROFIT SECTOR

In anticipation of future crises, nearly 57% of nonprofits are confident they can successfully confront whatever comes next. Another 37% are moderately confident in their ability to remain resilient, while the remaining 5% are either unsure or not confident.

Nonprofits worldwide continue to experience the negative impacts of the pandemic. More than 67% indicate that the challenges presented by the pandemic have increased over time, while 22% have experienced an easing burden. Nearly 10% conclude they've experienced no added adverse impact due to the pandemic.

Concern for program health is the top priority for nonprofits. Over 80% of respondents indicate funding is most needed for their service offerings while 60% cite the need for salaries as their top concern.

CAF America Survey, Volume 7, 12 Months Later: The State of the World's Nonprofits, 2021

Wisconsin COVID-19 Summary Statistics Cumulative data, Updated: 9/8/2022

Positive (Confirmed Case): 1,840,060

Hospitalized: 65,024

Deaths: 15,105

Vaccinations: 10,085,492

Boosters: 2,649,420

Wisconsin Department of Health Services, 2022

**2-1-1
Top Service
Requests (WI)-
August 2021-22**

▶ **29.3%**

Housing & Shelter

▶ **16.9%**

Mental Health & Addictions

▶ **12.3%**

Health Care & COVID 19

▶ **8.6%**

Utilities

▶ **6.7%**

Food

2-1-1 Counts - Wisconsin, 2022

HEALTH IMPACT OF COVID-19 BY RACE AND ETHNICITY IN WISCONSIN

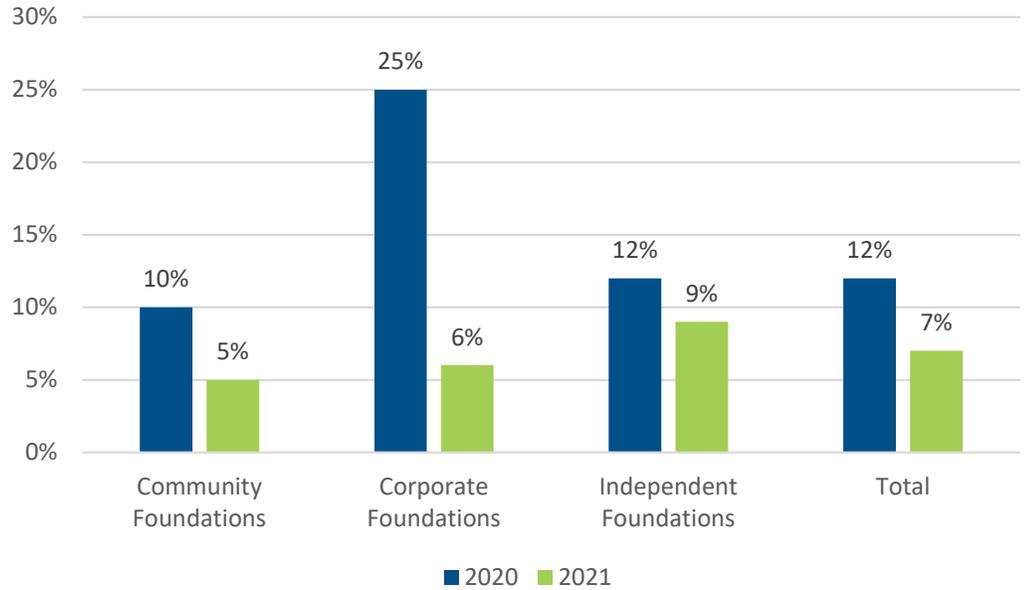
	Percent of Population	Percent of all COVID Cases	Cases per 100,000 People
Hispanic or Latinx	7.3%	9.7%	35,155
American Indian (Non-Hispanic)	1%	1.2%	32,893
Black (Non-Hispanic)	7%	8%	30,076
Asian or Pacific Islander (Non-Hispanic)	3%	3.2%	25,575
White (Non-Hispanic)	81.4%	77.8%	25,182

Wisconsin Department of Health Services, 2022

PHILANTHROPY AND COVID-19

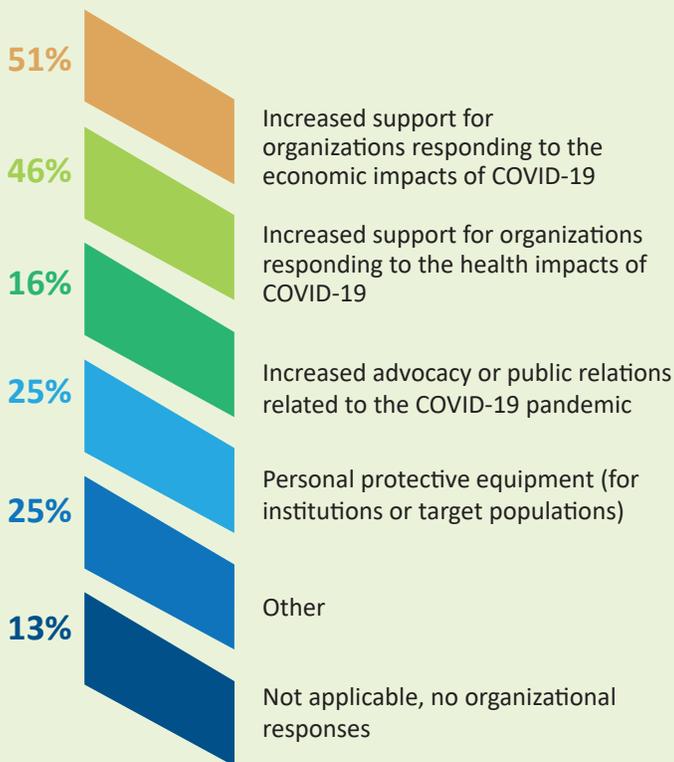
COVID-19 funding declined by 31% from FYE 2020 to 2021 (by survey respondents answering Candid's Foundation Giving Forecast Survey). Among 490 foundations who shared data for both years, overall grantmaking increased in FYE 2021 by 11% (unadjusted for inflation). COVID-19 dollars, however, decreased. In all, 398 foundations estimated \$2.1 billion in COVID-19 support in FYE 2020, and 323 foundations provided nearly \$1.5 billion in FYE 2021.

COVID-19 funding as a proportion of overall grant dollars also declined in 2021. Whereas COVID-19 funding accounted for 12% of total giving in 2020, that proportion fell to 7% in 2021.

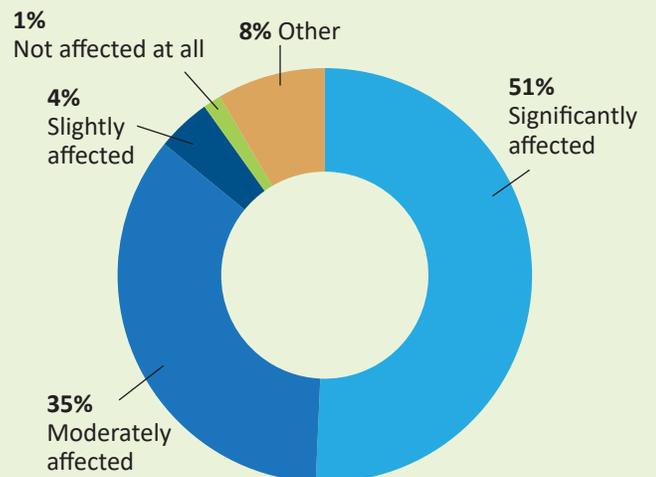


Philanthropy and COVID-19: Examining two years of giving. Candid and the Center for Disaster Philanthropy, 2022.

WI GRANTMAKER RESPONSE TO COVID-19



COVID-19 CRISES IMPACT ON WI GRANTEE PARTNERS



WPN Statewide Grantmaker Survey, 2022

NATIONAL GIVING TRENDS

21.8%

Giving to arts, culture, and humanities.
Unadjusted for inflation the number is: **27.5%**
Amount spent in billions: **\$23.5B**
Percentage of total contributions: **5%**

-2.4%

Giving to human services.
Unadjusted for inflation the number is: **2.2%**
Amount spent in billions: **\$65.3B**
Percentage of total contributions: **13%**

17.9%

Giving to public benefit organizations.
Unadjusted for inflation the number is: **23.5%**
Amount spent in billions: **\$55.8B**
Percentage of total contributions: **11%**

-4.5%

Giving to international affairs.
Unadjusted for inflation the number is: **0%**
Amount spent in billions: **\$27.4B**
Percentage of total contributions: **5%**

GIVING SUMMARY

.7%

Giving to religion.
Unadjusted for inflation the number is: **5.4%**
Amount spent in billions: **\$135.8B**
Percentage of total contributions: **27%**

2.9%

Giving to health.
Unadjusted for inflation the number is: **7.7%**
Amount spent in billions: **\$40.6B**
Percentage of total contributions: **8%**

-2.7%

Giving to individuals.
Unadjusted for inflation the number is: **1.8%**
Amount spent in billions: **\$11.7B**
Percentage of total contributions: **2%**

-7.2%

Giving to education.
Unadjusted for inflation the number is: **2.8%**
Amount spent in billions: **\$70.8B**
Percentage of total contributions: **14%**

6.1%

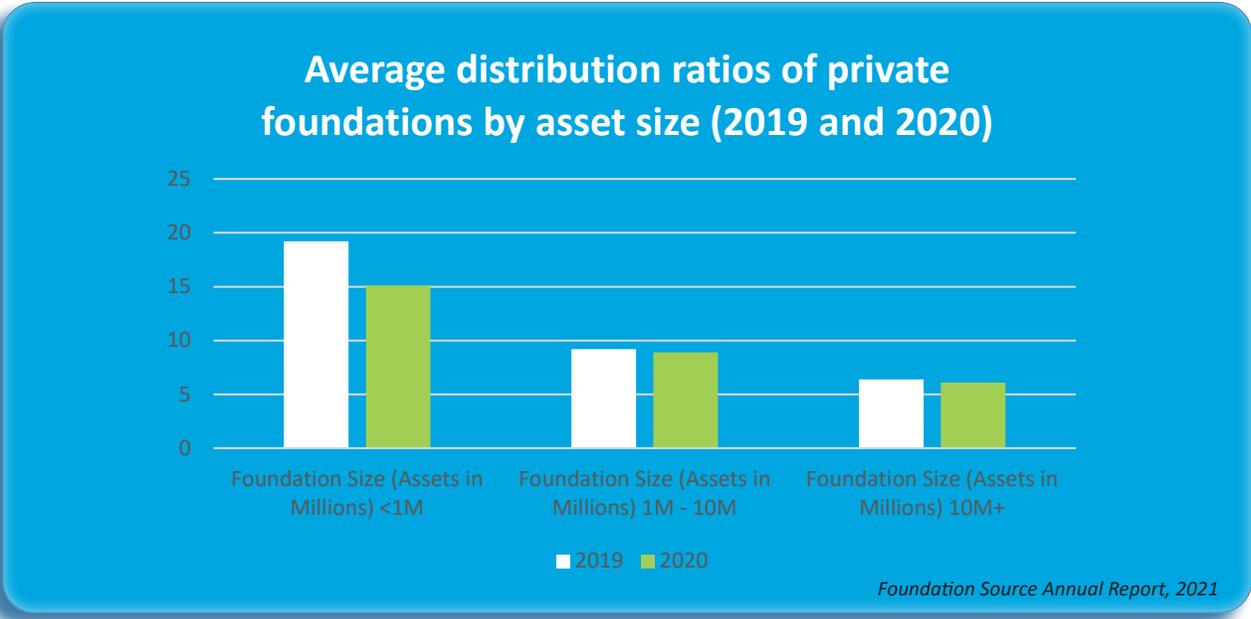
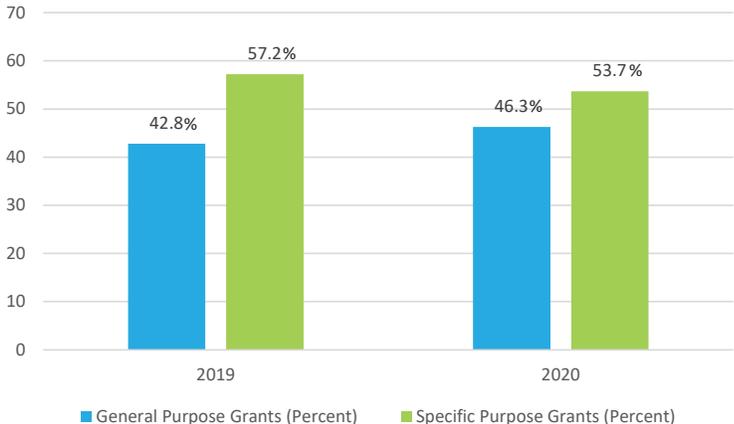
Giving to environmental.
Unadjusted for inflation the number is: **11%**
Amount spent in billions: **\$16.3B**
Percentage of total contributions: **3%**

GENERAL OPERATING SUPPORT VS SPECIFIC PURPOSE GRANTS ALL FOUNDATIONS

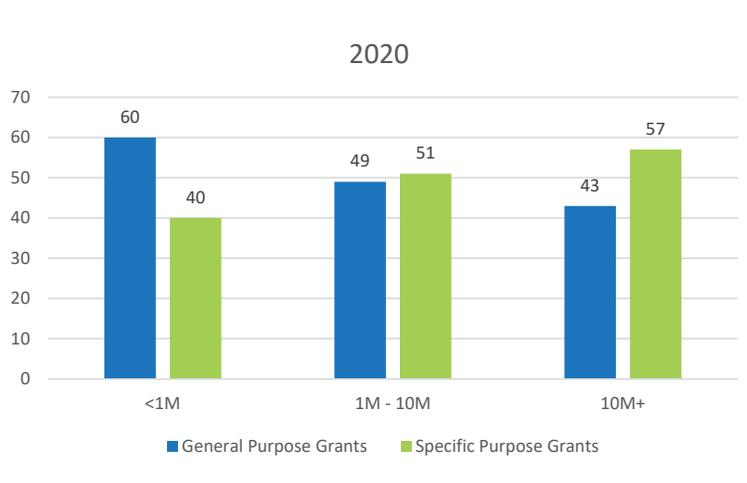
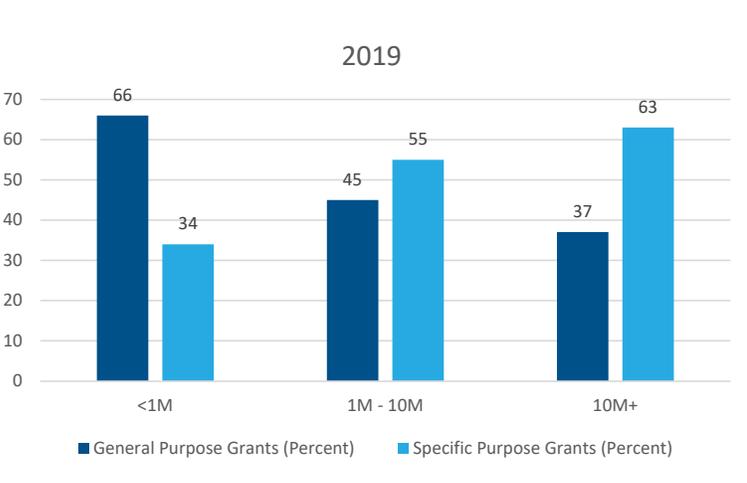
General purpose grants far outnumber special-purpose grants among foundations with assets below \$1 million.

Mid-size and larger foundations continued to favor specific-purpose grants in 2020, but both decreased the total number and awarded more general-purpose grants than in the previous year.

Foundation Source: 2021 Report on Private Foundations, 2021



GENERAL OPERATING SUPPORT VS SPECIFIC PURPOSE BY FOUNDATION SIZE



Foundation Source: 2021 Report on Private Foundations, 2021

NATIONAL GIVING TRENDS

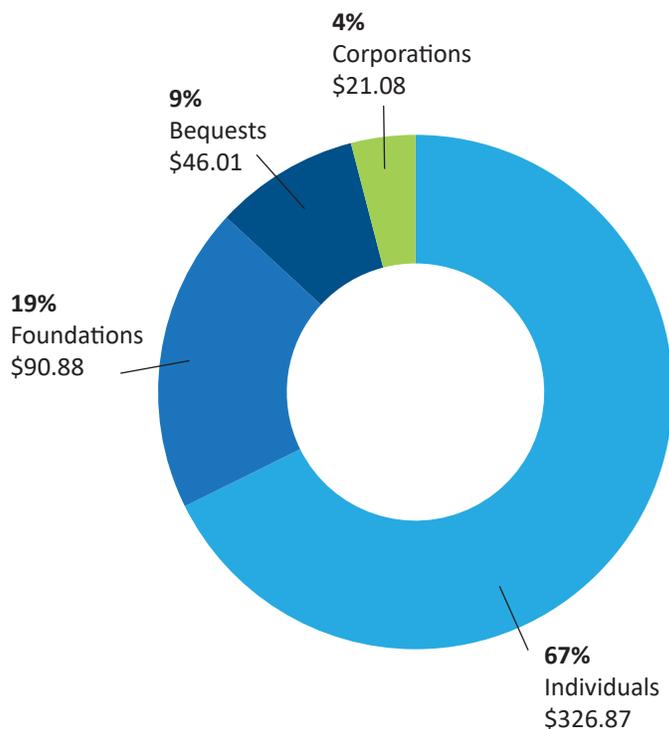
Total estimated charitable giving in the United States rose 4.0 percent between 2020 and 2021 to \$484.85 billion in contributions. When adjusted for inflation, giving remained relatively flat with a change of -0.7 percent. This reflects flat or positive growth in giving to six of the nine major recipient sub-sectors in inflation-adjusted dollars.

Giving USA: The Annual Report on Philanthropy for the Year 2021, 2022



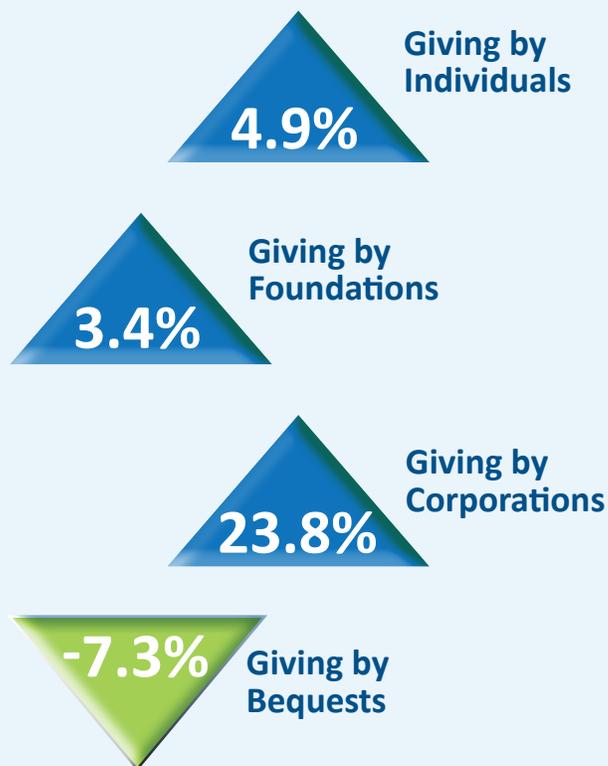
SOURCES OF 2020-2021 CONTRIBUTIONS

(in billions)

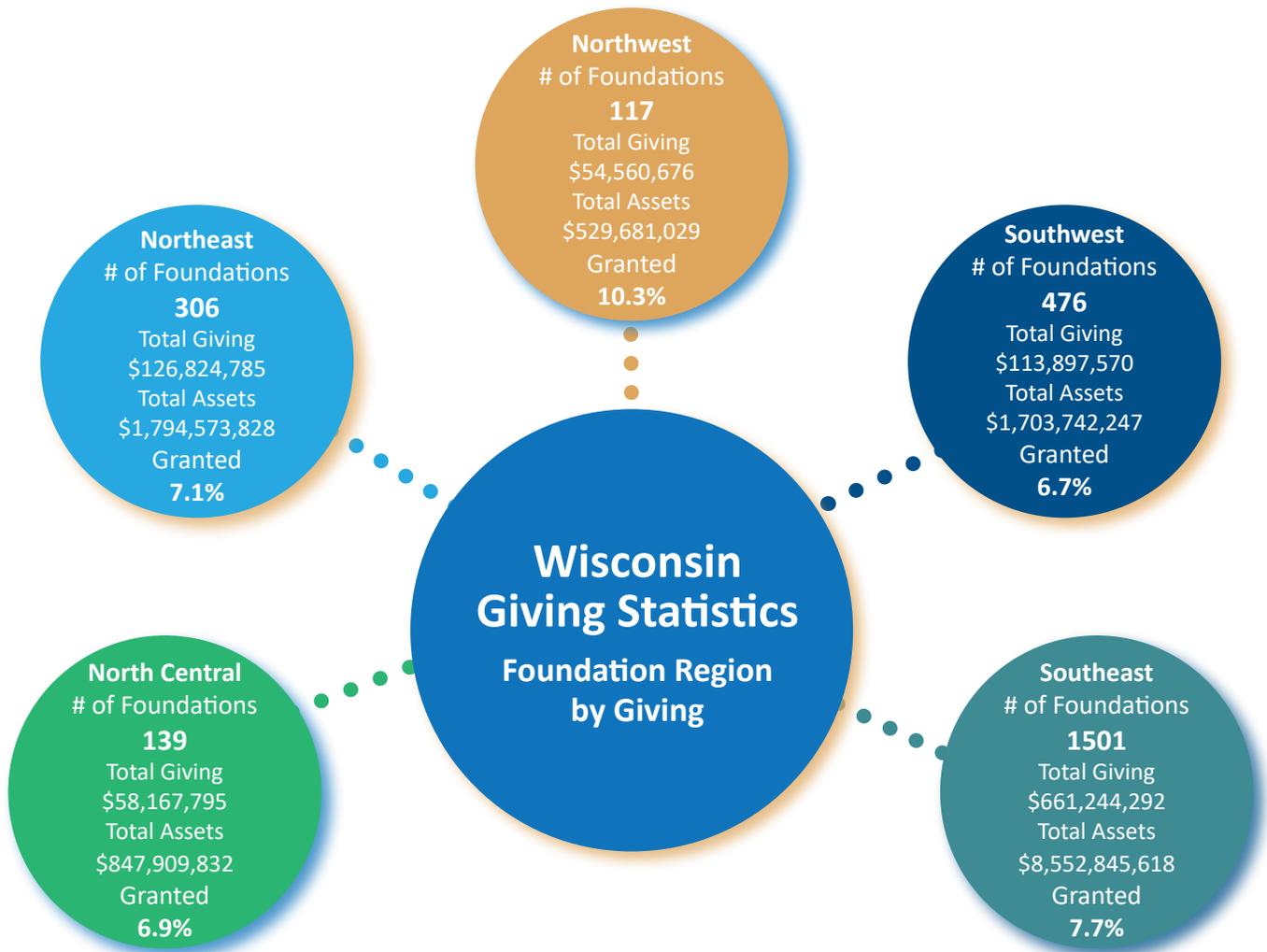


Giving USA: The Annual Report on Philanthropy for the Year 2021, 2022

PERCENT CHANGE IN GIVING BY SOURCE FROM 2020-2021



Giving USA: The Annual Report on Philanthropy for the Year 2021, 2022



CauseIQ, 2022

WI NONPROFIT STATISTICS

Economic Impact

Wisconsin nonprofit employment accounts for **13%** of the state's total workforce

Total annual non-officer salaries and wages **\$14.2 billion**

Number of employees in the state's workforce, **404,803**

Number of full-time employees, **3,141**

CauseIQ, 2022

TOTAL FOUNDATIONS IN WISCONSIN: 1,254

Total Assets	\$11,172,840,884
Total Giving	\$797,868,831
Percent Granted	7.1%

Marquette University: Funding Information Center, 2022

NUMBER OF WISCONSIN NONPROFIT ORGANIZATIONS

501(c)(3) Public Charities	38,394
**Other 501(c) nonprofit organizations	17,573
*501(c)(3) Private Foundations	4,516

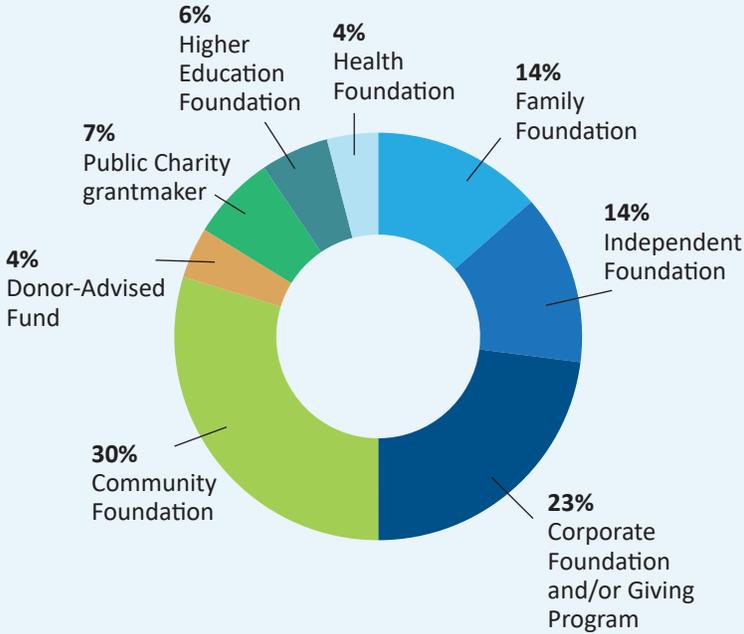
*Operating & non-operating

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

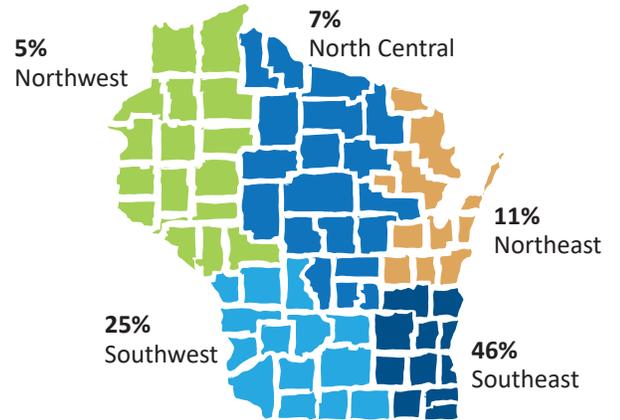
Guidestar, 2022

Respondent Demographics

TYPE OF GRANTMAKER

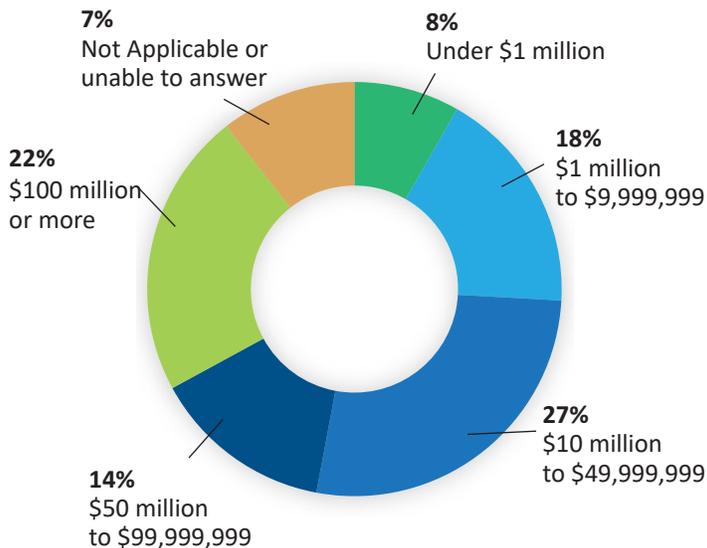


SURVEY RESPONDENT SNAPSHOT

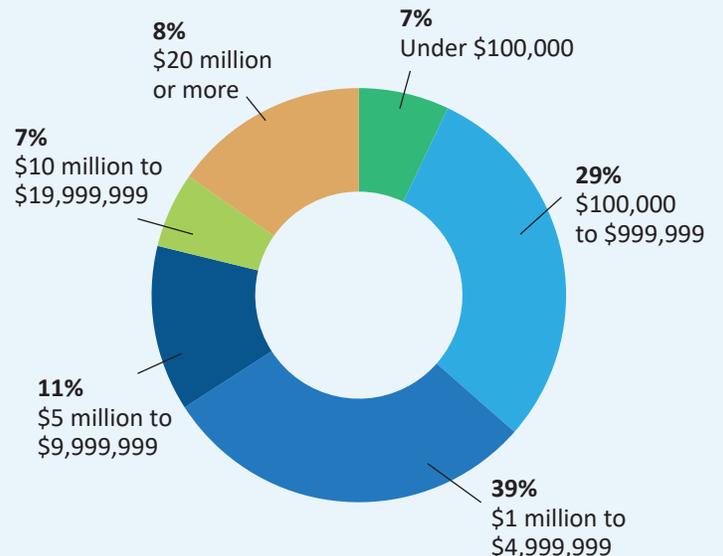


6% of respondents indicated they were located outside of Wisconsin.

ASSETS

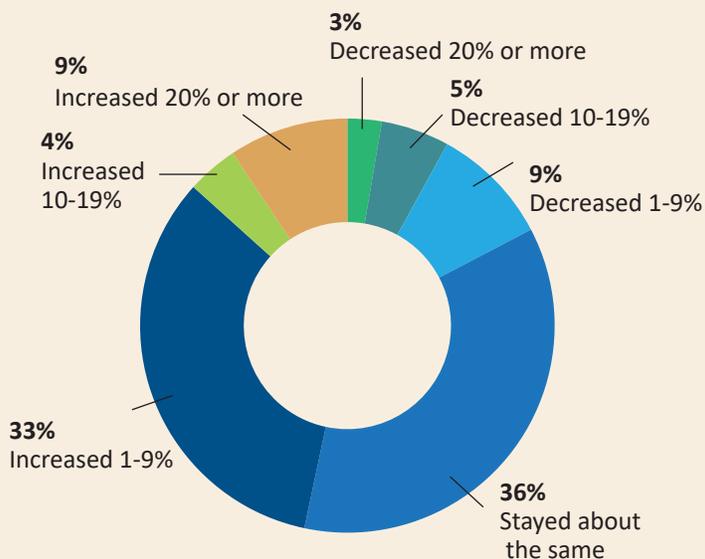


ESTIMATED GRANTMAKING FOR 2022

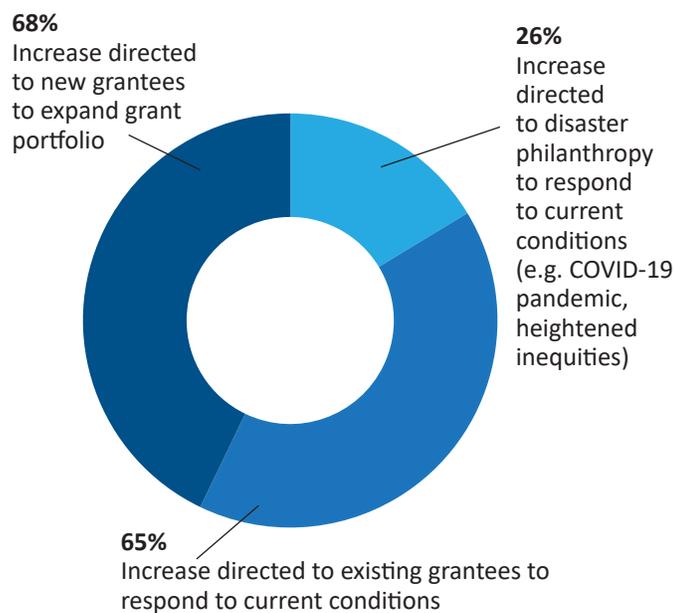


*Wisconsin Philanthropy Network surveyed approximately 300 grantmakers across Wisconsin. Results reflect a 40% response rate.

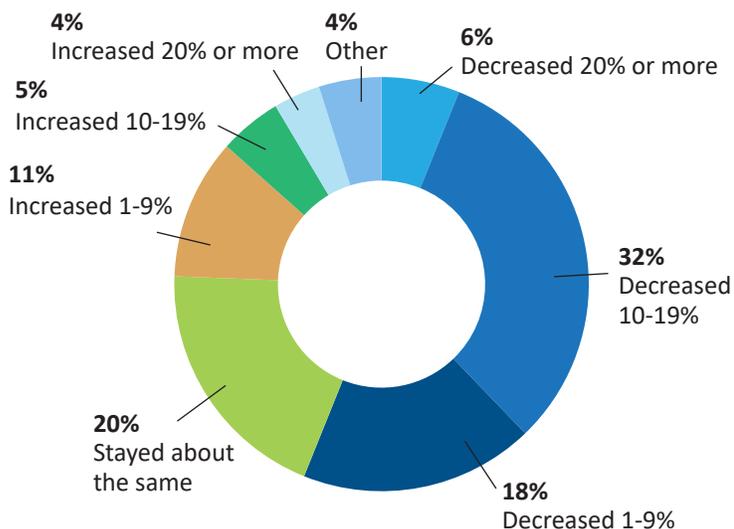
ESTIMATED CHANGE IN GRANTMAKING FROM 2021



REASON/INFLUENCE FOR CHANGE IN GRANTMAKING



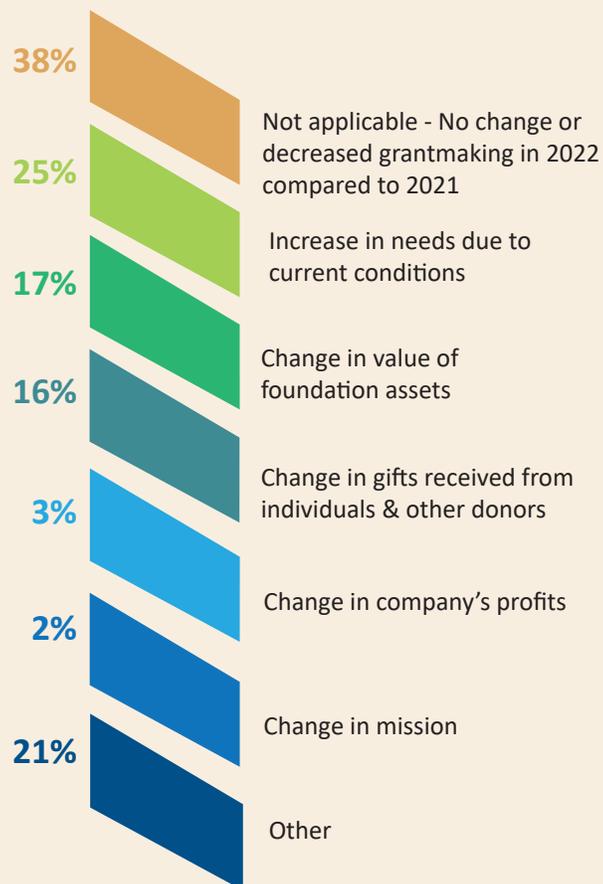
EXPECTED CHANGE IN ASSETS FROM 2021



Reasons for Change in Assets:

- 1) Change in markets & return on investments (78%);
- 2) Change in grant payouts (18%);
- 3) No change (15%);
- 4) Change in investment strategy (1%);
- 5) Other reasons for asset changes included significant increases in funds/gifts to the foundation in 2021

REASONS CITED FOR INCREASED GRANTMAKING THIS YEAR



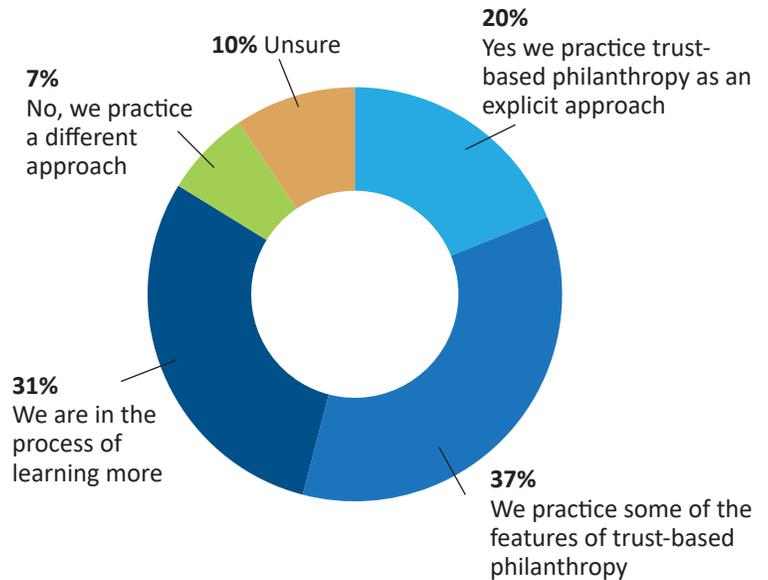
WI ORGANIZATIONS PRACTICING TRUST-BASED PHILANTHROPY

Does your organization practice trust-based philanthropy?

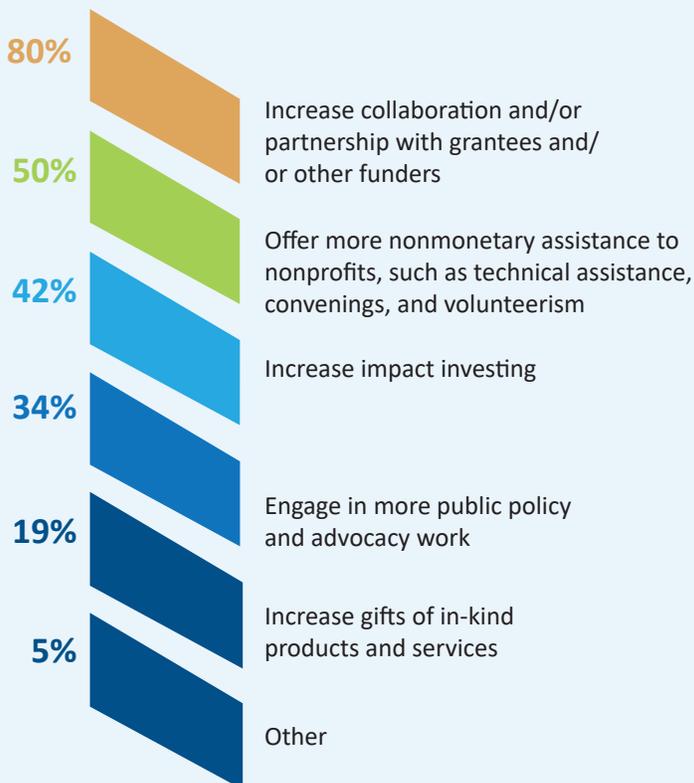
TRUST-BASED PHILANTHROPY

An approach to giving that addresses the inherent power imbalances between funders, nonprofits, and the communities they serve. At its core, trust-based philanthropy is about redistributing power—systemically, organizationally, and interpersonally—in service of a healthier and more equitable nonprofit ecosystem. On a practical level, this includes multi-year unrestricted giving, streamlined applications and reporting, and a commitment to building relationships based on transparency, dialogue, and mutual learning.

Trust Based Philanthropy Project, 2021



PERCENT OF RESPONDENTS CONSIDERING ADDITIONAL CHANGES (BEYOND GRANTMAKING)



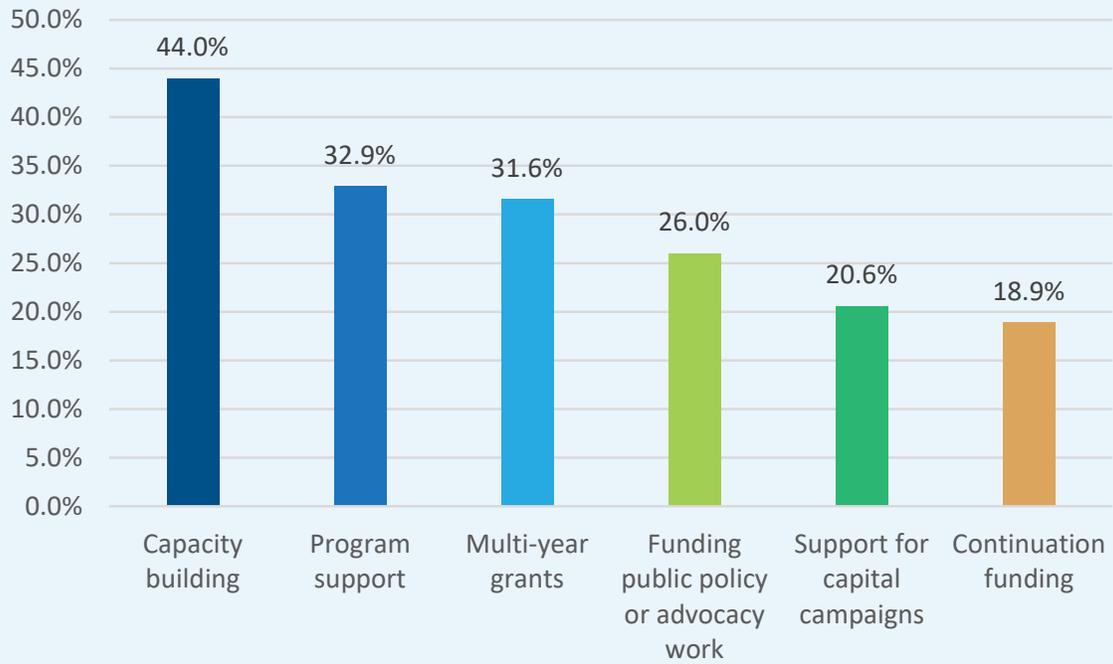
TRENDS IN PHILANTHROPY TODAY THAT MOST INTEREST WPN MEMBERS:

1. Collaborative Funding
2. Trust-based philanthropy

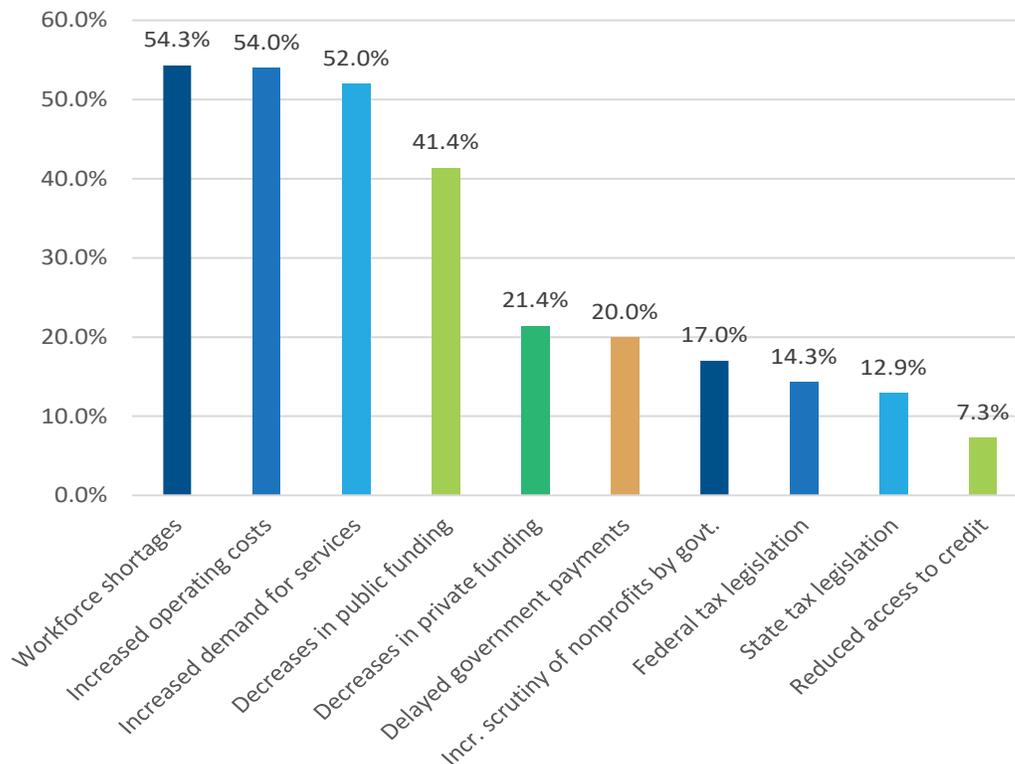
WPN MEMBERS MOST COMMON CONCERNS IN 2022 AND BEYOND:

1. **NEED FOR COLLABORATION**
Embracing COVID-19 learning, and public-private partnerships.
2. **LIMITED FUNDING AVAILABILITY**
How to meet the needs of nonprofits in terms of economic realities.

WHERE ARE GRANTMAKERS PLANNING INCREASES?



GRANTMAKERS TOP CONCERNS ABOUT WISCONSIN'S NONPROFIT SECTOR



WPN CAPACITY BUILDING SURVEY RESULTS

65%

Would provide more capacity building support if additional resources were available.

70%

Would be interested in engaging in further discussions with other funders on this topic.

CAPACITY STRENGTHENING SUPPORT FOR NONPROFIT ORGANIZATIONS (CONTINUED)

Among trends in capacity strengthening support, funders are increasingly recognizing and seeking to redress how nonprofits led by Black, Indigenous or People of Color have been historically closed out of capacity strengthening opportunities. Funders are also increasingly seeking to support the capacity of networks, coalitions, and movements, in addition to the capacity of individual nonprofit organizations.

Some promising practices for nonprofit capacity strengthening include:

- New considerations for how to identify and support early-stage and emergent nonprofit organizations
- Intentional efforts to support power sharing and power building in funder-grantee relationships
- Support for place-based, affinity-based, and culturally-informed peer learning cohorts
- Providing for nonprofit staff wellness and healing from trauma and burnout
- Coaching and resources to support nonprofit organizations' use of data and evidence about the communities they serve and program outcomes.

CAPACITY STRENGTHENING SUPPORT FOR NONPROFIT ORGANIZATIONS

One way that foundations increasingly seek to positively impact nonprofit organizations and the communities they serve is through capacity-building or capacity-strengthening support. What do these efforts look like and why are they valuable?

From a field scan of nonprofit capacity strengthening published by the Hewlett Foundation in 2022, the authors found that many funders provide this kind of support for the goals of ensuring the organizational health, sustainability, and resilience of grantees. Funders typically offered monetary funds for capacity-strengthening projects and/or non-monetary support, including access to services and resources like consultants, coaching, peer learning and networking, or learning materials. Funders make distinctions between shorter-term capacity-building projects and longer-term, holistic investments in organizational development, but see both as important.

Funders typically offer monetary funds for capacity strengthening

68%

MEMBERS

Pay for attendance at conferences, organizing professional trainings, and convenings on specific issues.

70%

MEMBERS

Responded YES when asked: Does your organization make grants to nonprofits in your area for capacity building support?

UW HEALTH & TRUST-BASED GIVING: A NEW APPROACH TO SUPPORTING COMMUNITIES WE SERVE



As members of the Wisconsin Philanthropy Network, we have a shared purpose to improve the world around us. Growing awareness about systemic racism has many of us asking – “What should we do differently?” Over the past decade, UW Health adopted a trust-based philosophy of corporate giving and has prioritized partnering with organizations led by people of color that address our organization’s community health improvement and diversity, equity and inclusion priorities.

Trust-based philanthropy employs equity-based principles, including non-bureaucratic decision-making, transparent communication and shifting power to those with lived experience. It removes unnecessary barriers to funding and centers voices of color.

At UW Health, we focus on:

- Prioritizing organizations that have historically had access to the least resources
- Providing unrestricted contributions so organizations may spend funds as they need
- Trusting leaders of color. As of July 2022, 72 percent of our contributions budget goes to organizations led by people of color
- Building authentic relationships across the community to gain first-hand knowledge of the work and needs in the community
- Being accessible and responsive. We do not have an application form.
- Regular meetings and conversations take the place of formal reporting as well as reports completed for others
- Having a diverse team of decision-makers

The intentional work of our team in the community creates the foundation of our giving. “By cultivating genuine, intentional relationships with a diverse array of community members, we have honest conversations about what is going on and what needs to be done, and we bring these perspectives to our decision-making,” said UW Health Community Relations Director Juli Aulik.

Adopting trust-based philanthropy principles strengthens our partnerships and allows our partners to focus on mission-delivery. Unrestricted giving provides them flexibility and signals trust. Community-based organizations typically have limited staffing and resources, so designing streamlined application and reporting processes allows them to focus on serving the community. Applying an equity lens to decision-making focuses giving on organizations that have previously been underfunded.

UW Health’s journey toward trust-based giving took place over several years with a great deal of reflection and conversation—and it’s certainly continuing. We were inspired to start this work at a Wisconsin Philanthropy Network conference by keynote speaker Vu Le. We started learning more through Mr. Le’s blog, Nonprofit AF, and continued through much study and discussion. These conversations, especially with non-profit partners and other funders, led us to observe others joining us to different degrees in their approaches.

If you are interested in exploring further, some resources you can start with:

- Vu Le’s weekly blog, Nonprofit AF, for example his post, “9 questions to help you develop an equity mindset”
- Wisconsin Philanthropy Network’s programs to learn from other funders and through their trainings
- Our website which outlines our philosophy and practices

**MEMBER
SPOTLIGHT**

THE POWER OF COLLABORATION: BUILDING A BRIDGE FOR NONPROFIT CAPACITY BUILDING & EQUITY.



A powerful partnership between Wisconsin grantmakers and Catchafire

The last few years have tested Wisconsin's philanthropic network - an ongoing pandemic, economic uncertainty, and an overwhelming demand in services from already overextended nonprofits has severely impacted the community. In Wisconsin, two funder collaboratives teamed up to provide capacity building resources to organizations at both a city and state-level.

Participating funders brought in Catchafire, a technology solution that connects nonprofits with highly-skilled volunteer professionals from across the globe, prepared to lend their expertise in areas such as marketing, finance, HR, fundraising, IT, graphic design, and more. Nonprofits also receive access to one-on-one coaching, monthly trainings, and a nonprofit Executive Director support group to build a community around learning and growth.



The funding partners seek opportunities to support nonprofits with both the monetary and nonmonetary tools they need to lead and succeed in their communities. According to the funders comprising the Greater Milwaukee Partnership, underwriting the Catchafire platform adds another tool in the nonprofit capacity building toolbox to help nonprofits operate as effectively as possible. In addition, the Partnership provides a vehicle for funders to pool resources that contribute to a healthy, thriving nonprofit sector in the Greater Milwaukee area.
Greater Milwaukee Partnership

ACCELERATING IMPACT IN MILWAUKEE WITH CATCHAFIRE

In 2021, Advancing a Healthier Wisconsin Endowment, The Burke Foundation, Greater Milwaukee Foundation, Northwestern Mutual Foundation, Siebert Lutheran Foundation, and Zilber Family Foundation created the Greater Milwaukee Partnership with the goal of strengthening Milwaukee nonprofits through Catchafire and its volunteer network. With representation from various kinds of foundations: health, corporate, family, and community, the funder collaborative provides one example of how philanthropy has risen to meet the needs of the local community. Since launching, the Greater Milwaukee Catchafire partnership has connected nonprofits to high-quality expert support, saved them time, and provided more than \$800,000 in donated services, helping them complete work they would have been challenged to do alone.

- Top 3 Requested Projects:**
- Translation
 - Design & Visual Brand Identity
 - Time Management Coaching

ADDRESSING NONPROFIT NEEDS ACROSS THE STATE

The Advancing a Healthier Wisconsin Endowment at the Medical College of Wisconsin and the Wisconsin Partnership Program at the University of Wisconsin School of Medicine and Public Health launched a statewide capacity-building program, "Partnership for a Healthy Wisconsin." United by a vision of health equity for all of its communities, the Partnership focuses on capacity support for local nonprofits that seek to have a positive impact on the social determinants of health. With a large portion of its grantees representing the state's local health departments and boards, the Partnership's investment supports healthy initiatives that will support Wisconsin's communities, now and for generations to come. The initiative has already helped nonprofits save over \$235,000!

IDEAS FOR IMPACT

Salli Martyniak, Community Matters LLC

For the past year, WPN has been convening discussions addressing impact investing. The convenings have offered real life ideas for no-risk investing for impact while receiving a return on investment.

One idea involves investing in minority depository institutions. (“MDI” is a federal designation for banks and credit unions that are either owned or operated or both primarily by BIPOC communities.) These institutions close the gap on the unbanked and the underbanked, supporting home ownership and business development in their local communities. An investment up to \$250,000 in one of these institutions is insured by the FDIC so there is no risk to the investor. It’s also an excellent way to extend your DEI commitment. MDI banks in Wisconsin include Bay Bank and Columbia Savings & Loan.

If you are concerned about risk, don't be. These bridge loans are some of the safest loans

Meet your own mission by investing in projects that align with your giving strategies.

Another idea for impact investment opportunities involves looking at the capital campaigns currently underway in your immediate community. Many of them have successfully met or are nearing their fundraising goal and have either started their projects or will be ready to break ground in the near future.

The good news is the money and pledges are in hand; however, we can all agree that pledges won't pay the contractors! So, that means these projects will be “forced” to take out loans from conventional institutions to fill the time gap between the invoices and the pledges coming due. This offers perfect opportunities for you and your own donors to invest in the impact of these projects with a multi-year low-interest or zero-interest loan, saving the project interest costs.

You can also meet your own mission by investing in projects that align with your giving strategies, whether it's early childhood education or healthcare or workforce training or whatever in your selected focus.

If you are concerned about risk, don't be. These bridge loans are some of the safest loans because repayment is dependent on pledges from trusted local sources and the boards of the project organizations may include some of your own donors. It's an excellent way to increase your foundation's commitment to impact investing.

If you haven't yet dipped your toe into lending for impact, these two ideas offer low-risk opportunities for you to further your reach into your communities. What makes them even more attractive is they present easy conversations to have with your CFO and board members. It's time to get stop thinking and start doing!

Connect with the Wisconsin Impact Investing Collaborative or one of its members today!

<https://wi3c.org/>

SIX DATA-DRIVEN APPROACHES TO ACHIEVING HEALTH EQUITY

Eileen Salinsky | Grantmakers in Health, GIH Bulletin Issue Focus

- ▶ Engage community members at every stage of research and evaluation efforts.
- ▶ Recognize that meaningful community engagement requires commitment, flexibility, and dedicated funding.
- ▶ Support researchers who come from communities of color and build a pipeline for developing young talent.
- ▶ 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.
- ▶ Utilize a positive, asset-based approach to analyze health equity issues.
- ▶ Integrate an equity frame in routine data collection, analytic, and decision-making activities.

SOCIAL DETERMINANTS OF HEALTH

The County Health Rankings help communities understand the critical influence that education, jobs, income, environment and more have on community and individual health and illuminate areas of need for focusing improvement efforts. The chart to the right is a snapshot of some of these factors, comparing Wisconsin and national conditions from 2021 to 2022.

University of Wisconsin Population Health Institute, County Health Rankings State Report, 2022

	Wisconsin (2021)	Wisconsin (2022)	National (2021)	National (2022)
▶ Population	5,901,473	5,949,155	336,997,624	338,289,857
▶ Social and Economic Factors				
Unemployment (Percentage of population ages 16 and older unemployed but seeking work.)	3.6%	3.1%	5.2%	3.7%
Income Inequality (Ratio of household income at the 80th percentile to income at the 20th percentile.)	4.2	4.2	4.9	4.9
Children in Poverty (Percentage of people under age 18 in poverty.)	14%	12%	17%	16%
High School Completion (Percentage of adults ages 25 and over with a high school diploma or equivalent.)	92%	93%	88%	89%
▶ Health and Environmental Factors				
Low birthweight (Percentage of live births with low birthweight (< 2,500 grams).)	7%	8%	8%	8%
Severe Housing Problems (Percentage of households with at least 1 of 4 housing problems: overcrowding, high housing costs, lack of kitchen facilities, or lack of plumbing facilities.)	14%	14%	18%	17%
Food Environment Index (Index of factors, including food insecurity, that contribute to a healthy food environment, from 0 (worst) to 10 (best).)	9	9	8	8

RURAL PHILANTHROPY

In recent years, funders have begun to talk more about the needs of rural communities and the role philanthropy can play in meeting those needs. As noted in the 2021 report by FSG, *Rural America: Philanthropy's Misunderstood Opportunity for Impact*, the issues and challenges these areas face are often different and overlooked by funders. Approximately 20% of the United States population lives in rural areas and while generally older and with a higher concentration of white people, there is considerable diversity across rural communities and people of color are the fastest-growing segment of the rural population.

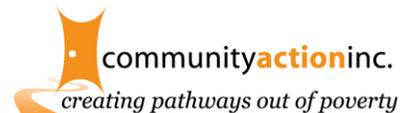
Rural communities experience consistent inequities in health, education, financial well-being, and other social indicators. According to some indices, the majority of disadvantaged communities in the country are in rural areas. These inequities are a result of historical, economic, political, and structural factors which should be considered when developing and refining philanthropic strategies.

For funders to work effectively in rural communities, they may need to reexamine some of their ways of operating. For effective rural philanthropy, the author of a recent piece in *Inside Philanthropy* recommends that funders know and empower place-based rural institutions and collaborate with their on-the-ground experts. Doing so builds from existing community assets, strengthens them, and offers greater promise for sustained progress towards a community's vision. In rural areas, these institutions may not be the stand-out nonprofit, but may be the local school district, a health clinic, a business, or an emerging coalition of individuals and organizations. Collaborative, relationship-centered philanthropic work in rural communities holds promise for positive impact in underserved areas, as well as better ways for funders to work in all communities.

Empower place-based rural institutions and collaborate with their on-the-ground experts

COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN PROVIDES EARLY SUPPORT FOR SNACKPACKERS

Community foundations energize many programs throughout Wisconsin, providing a springboard for neighborhood support where it's needed most.



AWARE in Evansville, a program of Community Action, Inc. of Rock & Walworth Counties,

launched its Snackpackers program as a pilot in 2005 to address childhood hunger. Early support from the Community Foundation of Southern Wisconsin through the Evansville Fund ensured this program's success delivering weekend meals and snacks to low-income students' backpacks while they were at school. The backpack deliveries helped struggling families maintain their dignity in the small, rural town of roughly 5,000 residents.

Ongoing funding from the Evansville Fund inspires other local groups to donate to the Snackpackers program, and the program quickly became a model for similar food delivery services throughout the state. These gifts were also crucial to maintaining the Evansville Snackpackers distributions throughout the pandemic, allowing the flexibility to pivot to home deliveries for families when schools were closed. Parents appreciated that the food was delivered directly to their doorsteps disguised in boxes as if it were a simple Amazon delivery.

Local groups and donors continue to step forward to support their neighbors in need. In 2021, Snackpackers provided 10,205 meals to hungry children in Evansville. Since inception, hundreds of children and families have seen their quality of life improved. These results are only achieved through the ongoing commitment of the Community Foundation of Southern Wisconsin.

--Community Action, Inc. of Rock & Walworth Counties



MEMBER SPOTLIGHT

RACIAL EQUITY AND PHILANTHROPY

With the disproportionate impacts of the pandemic on communities of color, health and economic impacts, and the increased calls to address racial violence after the murder of George Floyd, many in philanthropy considered 2020 a time to make stronger commitments to justice, equity, diversity and inclusion. In a survey of 236 foundations by the Center for Effective Philanthropy, almost all reported new or greater focus on supporting groups most impacted by the pandemic, especially Black, Latino, and low-income communities. Foundations shared plans to increase funding of racial justice efforts, to organizations led by people of color, or to organizations serving communities of color. Foundations also described initiatives to improve diversity, equity, and inclusion within their staff and boards. With these efforts in mind, how has philanthropy done?

Some foundations have followed through with important steps towards racial equity. In a 2021 study, the Philanthropic Initiative for Racial Equity looked at funding for racial equity and racial justice efforts over the past decade and found steady growth, including a substantial jump in 2020, to approximately \$6 billion today. However, they note that this funding remains only a small portion of overall foundation funding at approximately 7 cents of every one philanthropic dollar. Further, they found that the funds actually granted in 2020 towards racial equity and racial justice were considerably smaller than initial estimates.

Many foundations also highlighted their efforts to ensure diverse, equitable, and inclusive staff and boards. The 2020 Diversity Among Philanthropic Professionals survey from the CHANGE Philanthropy coalition documents notable gains in the percentages of their staff who were people of color (from 38% in 2018 to 45% in 2020), people born outside the United States (10% in 2018 to 12% in 2020), and people with disabilities (6% in 2018 to 13% in 2020). Further, 86% of people of color working in philanthropy reported that they felt their race or ethnicity was received positively. However, the survey results also point to needed areas for improvement. For example, philanthropic professionals of color were 33 times more likely to report feeling exploited in their workplaces than their white colleagues, and lesbian and gay people working in philanthropy reported twice as many negative receptions than their heterosexual colleagues.



For foundations committed to racial equity, where do we go from here? Among the recommendations offered from these studies, some ideas stand out:

- Devote more resources to racial equity and racial justice, especially for work that is led by communities most impacted by historical and contemporary racial injustice.
- Engage communities of color in strategy and funding decisions by building and sustaining mechanisms for participation and leadership of members of marginalized communities.
- Fund transformational change through increased support for racial justice efforts, which build power in communities to address unjust systems, and not just racial equity.
- Explicitly commit to diversity, equity, and inclusion values and efforts in your foundation and repeat this commitment across internal and external audiences.
- Engage in an ongoing process of reviewing and refining your diversity and inclusion policies, practices, and your progress towards your goals.



WI GRANTMAKER INVESTMENTS IN RACIAL JUSTICE:



WPN Statewide Grantmaker Survey, 2022



We are being more intentional about seeking out and supporting organizations that are led by and support BIPOC communities. We also have a partnership with Public Allies to help build a pipeline for BIPOC leaders in the water and environmental fields.
 -Vicki Elkin, Fund for Lake Michigan



CUNA MUTUAL GROUP AND THE CUNA MUTUAL GROUP FOUNDATION



CUNA Mutual Group is a financial services company founded by credit union leaders with the principle of people helping people. For over 80 years, we have been helping people work towards a brighter financial future. Since 1967, the CUNA Mutual Group Foundation has lived into our company’s principles through philanthropic efforts. We make financial contributions to organizations with a focus in three areas: economic security, education, and emergency aid. Additionally, our partnerships look to address the racial and socioeconomic disparities that exist in our communities – those disparities that often prevent people from getting ahead financially. In 54 years, the CUNA Mutual Group Foundation has contributed more than \$43 million to the communities where we live and work.

In 2021, the CUNA Mutual Group made several key investments in two of our key communities: Madison, WI and Waterloo, IA. On the South side of Madison, the CUNA Mutual Group Foundation invested in over 9 organizations, including \$1M to the Urban League of Greater Madison’s The Black Business Hub and another \$1M to the Center for Black Excellence. In Iowa, the Foundation committed over \$750,000 to support All-In Grocers, which is a project that is anchored by a grocery store and will also feature other businesses and organizations that will support Waterloo’s historically Black community. We believe that investing in community we see a way to a more equitable society.

MEMBER SPOTLIGHT



PHILANTHROPY IN THE FOX VALLEY REGION

Quality of life and creating opportunities are important priorities for the Community Foundation for the Fox Valley Region. We are pleased our Fox Valley region’s municipalities are planning \$24 million in recreational trail construction by 2025 -- with the Community Foundation and donors as partners to advocate support and provide financial contributions toward these exciting improvements.

In the last two years, the Community Foundation and its donors have awarded nearly \$2 million to support trails including in Green Bay, Neenah, Shawano, Waupaca, Kaukauna, and Sherwood. Much of this support has been provided by the David L. and Rita E. Nelson Family Fund, which has been a catalyst in linking communities with new or upgraded trails since its establishment in 2018.

The Nelsons had planned well and included a provision for their estate to establish the charitable fund with more than \$100 million in the Community Foundation. We steward annual grants to support their favorite causes which include waterways, the environment and recreational trails.

The Community Foundation and partners convened a Fox Cities Trail Summit in early 2020 that attracted 16 municipalities and another nine organizations. The report that followed provides maps showing connections between trail segments and envisioned expansions of the trail network to desired nearby destinations.

Interest in the outdoors and in recreational trails has grown considerably during the COVID pandemic and it continues its popularity. People have rediscovered the outdoors and nature.

In 2022, the Nelson Fund established the Nelson Family Fund for Trail to High Cliff State Park with a \$2 million grant to support the creation of a recreation pedestrian and bicycle trail connecting the Fox Valley to High Cliff State Park. This commitment followed the development of a master plan completed in collaboration with public sector planners and trail advocates under the direction of East Central Regional Planning Commission. It was developed with public input and support.

Philanthropy makes a big impact in our communities. It can help catalyze improvements like trails and it can also enhance and build important elements into these enhancements.

The Fox Valley has learned a lot about inclusion in the outdoors. A few recommendations to consider anywhere trails exist and are being built include:

- Be proactive about inclusion: governments and outdoor organizations should reach out to diverse affinity groups and communities to listen and find opportunities for partnership
- Integrate Spanish and Hmong into programming, signage, and promotional materials and reach out to their communities
- Invite a diversity of community representatives to serve on the boards of environmental and conservation organizations
- Foster outdoor programming for and by marginalized groups, where all or most organizers and participants are members of a specific group
- Make gender-neutral bathrooms available at all facilities
- Create greenspaces a reasonable distance to people no matter where they live



MEMBER SPOTLIGHT

CHANGES IN GIFT AND GRANT ACTIVITY

Community foundations have seen variability in the increase or decrease of grants and gifts between 2019 and 2020 with 84% of responding foundations reporting changes in gifts and 83% reporting changes in grants.

Type of Activity	Dramatic Decrease	Moderate Decrease	Neutral	Moderate Increase	Dramatic Increase	Median Change
▶ Gifts	8%	23%	16%	23%	30%	16%
▶ Grants	3%	18%	18%	40%	22%	18%

2020 Annual Survey Results, Candid – CF Insights, 2020

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 (2020)	Discretionary Funds (2020)	All Other Funds (2020)
▶ \$0-\$25M	14%	22%	64%
▶ \$25-\$50M	10%	24%	65%
▶ \$50-\$100M	21%	18%	61%
▶ \$100-\$250M	26%	11%	63%
▶ \$250-\$500M	28%	13%	58%
▶ \$500M+	39%	9%	52%
▶ All	24%	16%	60%

Grantmaking by community foundations rose 37.9% from 2019 to 2020

2020 Annual Survey Results, Candid – CF Insights, 2020

DISTRIBUTION RATES

Larger community foundations tend to have higher fund distribution rates.

Size of Foundation	Donor-Advised Funds (2020)	Whole Foundation (2020)
▶ <\$25M	3%	4%
▶ \$25-\$50M	6%	3%
▶ \$50-\$100M	9%	5%
▶ \$100-\$250M	10%	7%
▶ \$250-\$500M	12%	8%
▶ >\$500M	14%	9%

2020 Annual Survey Results, Candid – CF Insights, 2020

In 2020, the median community foundation saw gift and grant totals both increase by double digits, and nearly a third of survey respondents reported a fundraising total increase of more than 50 percent over 2019, reflecting a field that was particularly well-positioned to be among the most active philanthropic institutions as the COVID-19 pandemic emerged.

DONOR ADVISED FUNDS RESPONDING TO URGENT NEEDS

In the wake of the COVID-19 pandemic, the ensuing recession, and the movement for racial justice, grants from DAFs increased substantially. In addition, giving from DAFs to human services organizations skyrocketed, as did giving to Historically Black Colleges and Universities and other racial justice organizations. These findings suggest that grants from DAFs are responsive to unexpected events such as those experienced in 2020.

Note: In 2021 grants from donor-advised funds passed \$30 billion for the first time.

National Philanthropic Trust, 2021 Donor-Advised Fund Report, 2021

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



National Philanthropic Trust, 2021 Donor-Advised Fund Report, 2021

From 2019 to 2020, charitable assets in donor-advised funds grew from **\$145.5 billion to \$159.8 billion, a 9.9% increase.**

From 2016-2020, charitable assets rose by a compound annual growth rate of 16.6%.

Grants from donor-advised funds to charitable organizations reached a new high at **\$34.7 billion, a 27% increase** from a revised 2019 total of \$27.3 billion and is one of the highest rates of increase on record.

1,005,099

the approximate number of individual donor-advised funds across the country in 2021, an increase of 16.3%.

Giving USA, Donor-Advised Funds New Insights, 2021

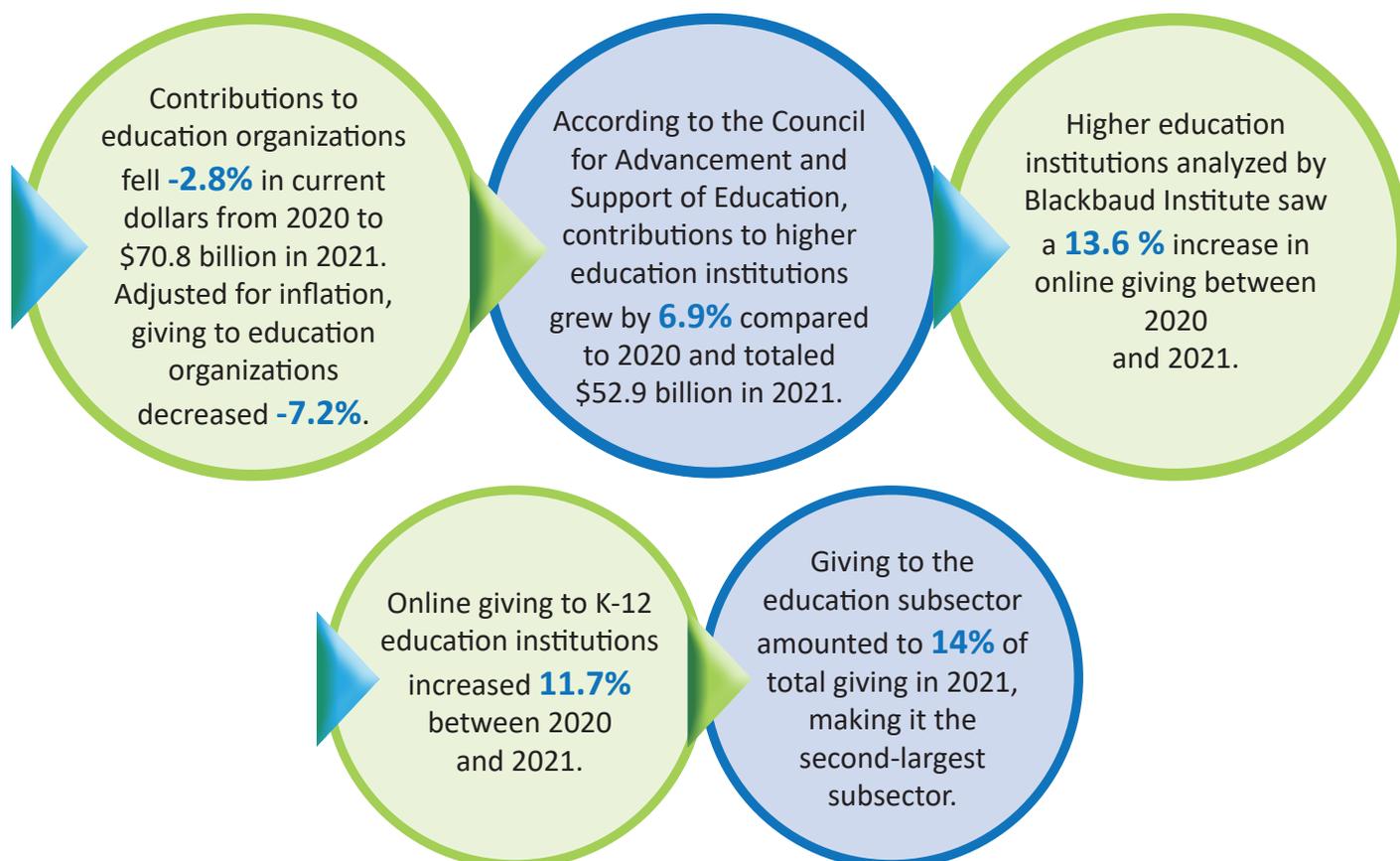
PHILANTHROPIC ISSUES & TRENDS: DONOR ADVISED FUNDS GIVING

Donor-Advised Fund Metric Overview	2019	2020	% Change
Charitable Assets	\$145.5	\$121.4	9.9%
Total Contributions	\$39.7	\$47.8	20.6%
Total Grant Dollars	\$27.3	\$34.7	27%
Grant Payout*	22.3%	23.8%	6.9%
Total # of DAF Accounts	864,187	1,005,099	16.3%
Avg. Size of DAF Account (\$)	\$168,355	\$159,019	-5.5%

*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.)

National Philanthropic Trust, 2021 Donor-Advised Fund Report, 2021

PHILANTHROPIC ISSUES & TRENDS: EDUCATION GIVING



OUR COLLECTIVE ACTION: A CALL FOR NONPROFIT PAY EQUITY

In October 2022, American Family Insurance celebrated 95 years as a customer-driven organization with a strong history of investing and serving communities where our employees, agency owners and customers live, work and do business.

We recognize and honor that community is at the heart of what we do, day in and day out. We seek to ensure that everyone in our communities has an opportunity to not only dream, but dream big, but we know there is much work to be done to make that a reality for all. We also know it's important to empower those closest to the work through intentional acts of trust to lean in, innovate and solve problems.

Our nonprofit community is not a “nice to have” resource but often the necessary and needed core of our complex social service networks. They are responsible for so much – ensuring basic needs are met, helping to educate future generations, being present in community, social impact metric reporting, the never-ending revolving door of fundraising – the list goes on and on. Yet, funders continue to expect their nonprofit partners to solve our biggest community problems at a discounted rate. Many organizations are being asked to do more – serve more people, provide more reporting, develop their “theory of change” with no additional funding.

As competition for employment continues to grow, large organizations, American Family included, continue to raise their minimum wage. While this can have tremendous positive impact, we need to acknowledge the downstream challenges this can have on our community partners who may not be in a position to match the wage movement in the for-profit sector. This is a complex and layered challenge that will require listening, learning and collaboration, but if funders don't start asking this question, what will be the long-term implications of a workforce we rely so heavily on? At American Family, we want to be part of this conversation as a partner and community member. Our response to nonprofit partners can't be (again) to go fundraise more. Our Foundation's first step is proactively building standard increases into future funding commitments to begin addressing the growing inequality in nonprofit wages and the rising cost of inflation. Where can you start? Begin these conversations at your organization. Increase funding to your partner organizations. No action is too small. But what can we do together that we can't do alone?



—*Dreams Foundation*—

As funders we must ask...Are nonprofit professionals receiving an equitable wage for the work we and others are asking them to do?

CORPORATE GIVING

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:

\$21 billion

Giving by corporations, which is estimated to have increased by **23.8% in 2021**, (growth of 18.3%, adjusted for inflation). Corporate giving includes cash and in-kind contributions made through corporate giving programs, as well as grants and gifts made by corporate foundations.

Giving USA: The Annual Report on Philanthropy for the Year 2021, 2022

10.1%

2021 U.S. Gross Domestic Product (GDP) growth over 2020 and corporate pre-tax profits increased an astonishing **37.4%** in current dollars. Both of these economic indicators are closely linked to corporate giving.

Giving USA: The Annual Report on Philanthropy for the Year 2021, 2022

41% growth

Total community investments by corporations had unprecedented growth as a consequence of companies' efforts to alleviate the negative effects of the COVID-19 crisis.

Chief Executives for Corporate Purpose: Giving in Numbers, 2021

CORPORATE GIVING

CONTINUED

Corporate pre-tax profits

A significant factor in how much corporations give each year, and changes in corporate giving closely follow corporate pre-tax profits. In the last four decades, since 1981, corporate giving as a percentage of corporate pre-tax profits has averaged **1.1%**. In 2021, giving by corporations, which includes grants from corporate foundations, is estimated to be **0.7%** of corporate pre-tax profits.

Donors (including corporations) continue to demonstrate agility and willingness to accommodate grantee needs in response to the pandemic, particularly through grant extensions, need-based funding, and changing the existing grant purpose to reflect shifting priorities.

CAF America Survey, Volume 7, 12 Months Later: The State of the World's Nonprofits, 2021

\$3.9 million

The median community investment allocated toward COVID-19 response in 2020 by corporations. The median ratio of COVID-19 contributions as a percentage of total community investments in 2020 was **16.6%**.

Chief Executives for Corporate Purpose: Giving in Numbers, 2021

\$500,000

The median community investment allocated toward Social Justice/Racial Equity in 2020 by corporations. The median ratio of COVID-19 contributions as a percentage of total community investments in 2020 was **2.5%**.

Chief Executives for Corporate Purpose: Giving in Numbers, 2021

COVID-19 pandemic

Continues to be a focus area for corporate giving. In 2021, corporations funded vaccination efforts, personal protective equipment, and medical equipment to treat COVID-19 patients.

Giving USA: The Annual Report on Philanthropy for the Year 2021, 2022

Racial inequity

Corporations continue to invest in addressing racial inequity, outpacing giving by foundations and individuals in this area, according to Candid.

Giving USA: The Annual Report on Philanthropy for the Year 2021, 2022

CONNEXUS CREDIT UNION'S PHILANTHROPIC EFFORTS BENEFIT THE GREATER GOOD



Connexus Cares is the charitable giveback program created in 2019 by Connexus Credit Union. Headquartered in Wausau, WI, Connexus has recently expanded its presence—both physical locations and philanthropic efforts—into Dane County, proudly serving the greater Madison community alongside thousands of members nationwide.

Connexus not only believes in making a difference in the lives of members, but also the communities in which we work and live. Through the efforts of Connexus Cares, we're able to make an impact in the community programs that benefit the greater good. We give with purpose because we know the ripple effect of making a positive impact in the lives of the most vulnerable in our communities.

As part of our giveback program, Connexus Cares recently supported the Community Partners Campus (CPC) in Wausau, WI. We were proud to donate our largest single contribution to date of \$1 million. We selected CPC as the recipient of this gift due to their collaborative support of multiple needs within the community; CPC is a non-profit center for organizations with a mission-driven purpose to provide access to food, clothing, shelter, medical care, mental health, and social wellbeing for all. Housing these organizations under one roof makes it easier for individuals to access their services, which extends their reach significantly. We are grateful for CPC's continued efforts to improve our central Wisconsin communities.

MEMBER SPOTLIGHT

NORTHWESTERN MUTUAL BUILDING A STRONGER CITY BLOCK BY BLOCK



For more than 25 years, Northwestern Mutual, through its Foundation, has been committed to improving the lives of children and families in need through financial support, volunteerism and collaboration with community partners to build stronger communities and create a long-term sustainable impact.

For 10 years, the company's nationwide efforts have been focused on accelerating the search for better treatments and cures for childhood cancer, while also supporting families undergoing treatment and survivors struggling with lasting effects. With the support of its employees and financial advisors nationwide, the company has contributed more than \$45 million and funded over 520,000 hours of research through its Childhood Cancer Program. Locally, the Northwestern Mutual



Foundation is dedicated to building a stronger city by increasing access to a quality education, revitalizing Milwaukee's underserved Amani, Metcalfe Park, and Muskego Way neighborhoods and supporting the city's leading cultural destinations.

MEMBER SPOTLIGHT

This year, Northwestern Mutual dedicated more than \$3.5 million in grants to nearly 40 local educational programs, nonprofits and schools to help close the opportunity gap for students in Milwaukee. The grants, which include a \$1 million commitment to Dr. Howard Fuller Collegiate Academy's capital campaign, Commit to the Future, to build a new, state-of-the-art high school, support the company's goal of increasing the number quality seats available at high-performing schools to ensure all children have access to an enriching and supportive learning environment. Building on its neighborhood revitalization efforts, Northwestern Mutual also provided \$1.7 million in grants to nearly 30 nonprofit organizations in Milwaukee's Amani, Metcalfe Park and Muskego Way neighborhoods to foster safe neighborhoods, healthy and thriving youth, and strong families. Working directly with residents, Northwestern Mutual is building a stronger city block by block.

PHILANTHROPIC RESPONSE FLEXIBILITY

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

36.3%
Change of grant purpose
(redirect funds to other or new projects)

47.1%
Grant extensions
(more time to implement current projects, to expend the grantfunds, or postpone reporting)

37.7%
Need-based funding
(we asked about and provided funding for our grantees' most urgent needs)

28.7%
Flexibility
(offered or requested)

CAF America Survey, Volume 7, 12 Months Later:
The State of the World's Nonprofits, 2021

Over the past 4 years we created a department of colleagues whose specific roles are focused on building the relationship with our nonprofit partners to better understand their needs. This has allowed us to connect partners with services, products, in kind donations, and assisted us in connecting colleagues interested in providing their time and talents to serve on boards, committees and general volunteerism opportunities.
-Jill Wiess, Associated Bank

**ALLIANT ENERGY:
BUILDING STRONGER
COMMUNITIES**



The Alliant Energy Foundation works to build stronger communities and serve customers by supporting five focused giving categories:

- Hunger and housing
- Workforce readiness
- Environmental stewardship
- Diversity, safety and well-being
- Community engagement

In 2021, Alliant Energy donated a total of \$11.5 million, and our employees and retirees logged 750,000 volunteer hours, to organizations and causes in these categories.

Recently, we have found success with two unique campaigns.

As part of our efforts to fight hunger, we:

- Pledged to donate three meals for every customer who signed up for My Account, our online account management tool, between May and July 2022.
- Donated nearly 50,000 meals to local food banks in

Iowa and Wisconsin after nearly 16,000 customers enrolled during the campaign window.



My Account
Good for you and your neighbors

To advance our environmental stewardship goals, we:

- Began our One Million Trees initiative, a plan to plant one million trees by the end of 2030. In its first year, over 120,000 trees were planted in Wisconsin and Iowa.

As part of the One Million Trees initiative, we expanded the Community Tree program from Iowa into Wisconsin.

- Offered grants to eleven Wisconsin communities to plant over 350 trees.



**MEMBER
SPOTLIGHT**



In regards to our priority goals (i.e. increase access to workforce housing, quality childcare and youth mental health), we provide a lot of community capacity building to help various sectors 1) learn about the barriers holding problems in place and 2) facilitate dialogue about their role in a community solution. In this regard, we bring in speakers, technical experts and occasionally support site visits and conferences.

-2022 WPN Capacity Building Survey Participant



**BRANCHES
DON'T MAKE
A BANK LOCAL.
ROOTS DO.**

Our Midwest roots mean the money at Associated Bank goes right back into the communities here, working for people and things you care about. Like \$797 million for low- to moderate-income housing loans, \$112 million in small business loans and 73,000 volunteer hours in 2018. Just to name a few.

[AssociatedBank.com/YourMoneyWorksHere](https://www.associatedbank.com/YourMoneyWorksHere)



ROCKWELL AUTOMATION FUNDS GRANT TO THE MILWAUKEE ROBOTICS ACADEMY (MRA)

Rockwell Automation funded a grant to the Milwaukee Robotics Academy (MRA) as part of our FIRST Robotics



commitment. Located in the heart of Milwaukee's Riverwest neighborhood, MRA works to bring high-tech STEM education to under-served populations in the City of Milwaukee. Through funding from FIRST and other community partners like Rockwell Automation, MRA provides facilities to high school students and teams to explore robotics and access to advanced machine shop equipment at no cost to the students or their families. MRA also provides mentoring, applied training, and skills-based programming.

As part of Rockwell Automation's belief in expanding human possibility we continue to make investments in our communities and students—our makers, builders and future innovators. MRA is among our community partners working to decrease barriers and amplify resources students need to be successful in their STEM-related extracurricular activities and creating our next generation of STEM professionals with 72% of college alumni working in STEM fields.

You can visit us and learn more about the [Milwaukee Robotics Academy](#) and its goal to provide accessibility and hands-on opportunities for students in Milwaukee.

To watch clips from MRA's 2022 summer workshops visit the [youtube page](#).



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