

Wisconsin Philanthropy Network

ANNUAL Report

2022



Dear Partner in Philanthropy:

Promoting effective philanthropy. That is our mission. That is who we are. Collaborating with our members to build professional capacity while addressing key issues facing our communities is what we do. In that spirit, we accomplished a great deal in 2022. Please take a few moments to celebrate our collective accomplishments.

Wisconsin Philanthropy Network (WPN), in partnership with members, continued efforts to address equity, trust-based philanthropy, and impact investing in our sector. We convened conversations and provided tools to help you navigate philanthropic discussions with an emphasis on inclusive practices. We continued to update our electronic tools, developing shared language and championing the power of philanthropy.

We once again published WPN's signature Wisconsin Gives Report highlighting the impact philanthropy plays in addressing critical issues across our state. We also exceeded organizational goals by engaging with members in a series of issue-based programs, philanthropic discussions, one-on-one meetings and regional convenings. We continue to embrace being virtual and engaging more members throughout the state in real-time conversations.

In 2022, we added new members to our team who are experts in programming and member relations. This has helped us continue our goal to remain close to and responsive to members while understanding your needs and desires associated with your membership.

Our geographic diversity grew as we welcomed new members from across the state.

We continue to be humbled by being Wisconsin's premier philanthropic resource. We continue to think innovatively about our relationship with you, our members. We are grateful to all of you for your energy, ideas, rigorous debate, and leadership within our sector.

Thank you for a fabulous year of growing together,

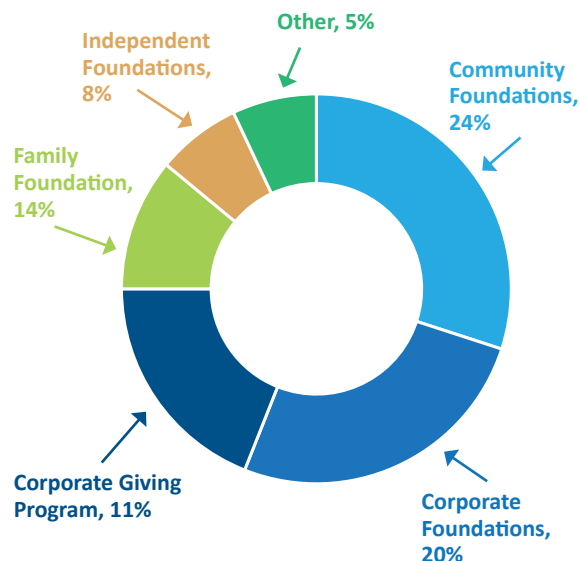


Erin Frederick
Board Chair



Tony Shields
President and CEO

Membership Composition



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.

Welcome to Our New 2022 Members!

Washington Co Campus Found
Herzfeld Foundation
Russell Cannon
Harley Davidson Foundation
Rural Wisconsin Health Cooperative
Connexus Cares - Connexus Credit Union
UW Credit Union
Hovde
Black River Falls Area Foundation
Madison Public Schools Foundation



WPN'S MISSION IS TO ADVANCE EFFECTIVE PHILANTHROPY

Programming and Professional Development:

Enhanced programming and professional development through virtual offerings that continue to increase access and create statewide conversations.

We continued to utilize the power of virtual programming, this provided members with unprecedented access to programs addressing important philanthropic issues like equity, and impact investing, trust based philanthropy and non profit capacity building. This resulted in creating statewide forums, and shrinking regional silos.

Enhanced Roundtables:

WPN's virtual roundtables in 2022 offered opportunities for funders to connect and learn from one another through functional areas and geographic focus. This was especially beneficial for funders supporting Equity, Impact Investing, and Trust-based Philanthropy in communities throughout the state.

Research:

In 2022, a total of 152 research requests were performed for more than 60% of our members, resulting in more than 200 hours of staff time and costs associated with accessing data, publications, and reports.

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

2022 Wisconsin Gives Report:

In 2022 we partnered with the University of Wisconsin Center for Community and Nonprofit Studies (CommNS) to produce WPN's signature 2022 Wisconsin Gives Report.

The report explored how philanthropy responded to challenges in 2022 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.

Strategic Planning/Organization Vision:

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

Member Engagement:

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

Community Engagement:

Cultivated outside relationships with community stakeholders to tell the story of philanthropy in Wisconsin, including panel participation, media opportunities as well as public presentations promoting philanthropy in Wisconsin.

National Philanthropic Trends:

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

2022 WPN FINANCIALS

FINANCIAL OVERVIEW

TOTAL ASSETS.....	\$729,921
TOTAL LIABILITIES.....	\$181,658
WITHOUT DONOR RESTRICTION..	\$250,597
WITH DONOR RESTRICTION.....	\$297,666
CASH AND CASH EQUIVALENTS...	\$497,846

SOURCE OF FUNDS

MEMBERSHIP DUES.....	36%
GRANTS & DONATIONS.....	38%
SPONSORSHIPS.....	5%
PROGRAM REVENUE.....	15%
PROGRAM-RELATED REVENUE..	6%

Total Revenue:
\$658,739

USE OF FUNDS

SALARIESFRINGE.....	42%
PROGRAMSMARKETING.....	46%
OUTSIDE SERVICES.....	8%
RESEARCH.....	2%
BUILDING/OCCUPANCY.....	2%

Total Expenses:
\$848,665

MEMBER FEEDBACK

WPN services

members find very important

Programs that highlight the expertise of in-state leaders

Skill-building programs and training on various aspects of grantmaking issues

WI Gives Report

Topical programs focused on existing or emerging local, state, or national trends

Top 5

philanthropic areas members find important:

57% Racial Equity

51% Equitable Grantmaking practices/Trust-based Philanthropy

48% Grantmaking Best Practices

41% Community/Economic Development

41% Community Engagement/Organizing

2022 WPN Members:

A.O. Smith Foundation
Advancing a Healthier Wisconsin
Alliant Energy Foundation
American Family Insurance Dreams Foundation
Anon Charitable Trust
Argosy Foundation
Ascendium Education Group
Associated Bank Community Accountability
Bader Philanthropies, Inc.
Baird Foundation, Inc.
Black River Falls Area Foundation
Brewers Community Foundation, Inc.
Carmen Witt
Carthage College
Charles D. Jacobus Family Foundation
City Forward Collective
Community Foundation for the Fox Valley Region
Community Foundation of Central Wisconsin
Community Foundation of Chippewa County, Inc.
Community Foundation of North Central Wisconsin
Community Foundation of South Central Wisconsin, Inc.
Community Foundation of Southern Wisconsin
Connexus Cares - Connexus Credit Union
Daniel M. Soref Charitable Trust
Direct Supply
Eau Claire Community Foundation
Foley & Lardner LLP
Fond du Lac Area Foundation
Fort Atkinson Community Foundation
Forward Community Investments
Gil Llanas
Greater Green Bay Community Foundation
Greater Watertown Community Health Foundation
Heil Family Foundation
Herb Kohl Philanthropies
Hovde Foundation
Hugh J. Andersen Foundation
Incourage
Jewish Community Foundation of the Milwaukee Jewish Federation
Jim Marks
Johnson Controls, Inc.
Joseph and Vera Zilber Charitable Foundation
Kaztex Foundation
Kelben Foundation
Kohler Foundation, Inc.
Komatsu
Lee Gentine Family Foundation
Madison Community Foundation
Madison Public Schools Foundation
Marshfield Area Community Foundation
Marybeth Budisch
MATC Foundation
Mathematics Institute of Wisconsin
Milwaukee Public Library Foundation
National Guardian Life Insurance Group
Nimick Forbesway Foundation
Northwestern Mutual Foundation
Old National Bank
Oshkosh Area Community Foundation
Otto Bremer Trust
Prairie Springs: The Paul Fleckenstein Trust
Racine Community Foundation
Rockwell Automation
Roots and Wings Foundation
Rural Wisconsin Health Cooperative
Russell Cannon
Schlecht Family Foundation
Scott Gelzer
Siebert Lutheran Foundation, Inc.
Suzanne & Richard Pieper Family Foundation
TASC
The Brookby Foundation
The Catholic Community Foundation
The Harley-Davidson Foundation, Inc.
The Jane Bradley Pettit Foundation, Inc.
The Johnson Foundation at Wingspread
The Lynde and Harry Bradley Foundation
The Needmor Fund
Theodore W. Batterman Family Foundation
The Richard & Ethel Herzfeld Foundation
TruStage (formerly CUNA Mutual Group Foundation)
United Way of Dane County
United Way of Greater Milwaukee & Waukesha County
University of Wisconsin La Crosse Foundation
UW Credit Union
UW Health & Quartz
Washington County Campus Foundation
Waukesha County Community Foundation
WHEDA Foundation
Wisconsin Community Health Empowerment Fund Inc.
Wisconsin Foundation United Church of Christ (UCC)
Wisconsin Medical Society Foundation
Wisconsin Trust Account Foundation, Inc.
Wispact Foundation
Women's Fund of Greater Milwaukee
Zurn Foundation, Inc.

WPN BOARD of Directors

Board Officers

Erin Frederick, Chair
Zilber Family Foundation

Christina Ellis, Vice Chair
Advancing a Healthier Wisconsin

Ken Robertson, Treasurer
Greater Milwaukee Foundation

Jason Kohout, Secretary
Foley & Lardner LLP

Board Members

Melissa Baxter
Waukesha County Community Foundation

Patricia Contreras
Rockwell Automation

Frank Cumberbatch
Bader Philanthropies, Inc.

Curt Detjen
Community Foundation for the Fox Valley Region

Wyatt Jackson
Community Foundation of Southern Wisconsin

Maggie Pascaly
American Family Insurance Dreams Foundation

LaDonna Reed
Associated Bank Community Accountability

Stephanie Schlecht
Schlecht Family Foundation

Alexandra Shade
CUNA Mutual Group

SPECIAL THANKS TO OUR 2022 BENEFACTORS AND SPONSORS:

GRANTS & SPONSORSHIPS

\$25,000 and above

Greater Milwaukee Foundation
Bader Philanthropies, Inc.
Daniel M. Soref Charitable Trust
Joseph and Vera Zilber
Charitable Foundation

\$10,000- \$24,000

Rockwell Automation
Schlecht Family Foundation
Siebert Lutheran
Foundation, Inc.

\$5,000 - \$9,999

American Family
Dreams Foundation
Northwestern Mutual
Foundation

\$1-\$4,000

Association of Fundraising
Professionals SE Wisconsin
Alliant Energy Foundation
Associated Bank
Charles D. Jacobus Family
Foundation
Community Foundation
for the Fox Valley Region
Community Foundation of
North Central Wisconsin
Connexus Cares - Connexus
Credit Union
CUNA Mutual Group Foundation
Foley & Lardner
Greater Green Bay
Community Foundation
Math Institute of Wisconsin
Northern Trust
Racine Community Foundation
Roots and Wings Foundation
Scott Gelzer
Strobel and Hanson

IMPACT INVESTING

Alliant Energy Foundation
Bader Philanthropies
Greater Milwaukee Foundation
Kids Forward

Forward Community Investments
Encourage Community
Foundation
Schlecht Family Foundation

WISCONSIN LEADERSHIP DEVELOPMENT (WILD):

Foundation for Civic Leadership
Greater Milwaukee Foundation
Tides Foundation