

**Association of Fundraising Professionals
Greater Madison Chapter
2015 Slate of Officers**

Nicole Hoffmann – President

Adam Erdmann- President Elect

Kirsten Houghton, CPA, MBA – Immediate Past President

Lori Werbeckes, CFRE - Secretary

Kirsten Houghton, CPA, MBA - Treasurer

Adam Erdmann - Communications Co-Chair

Clint Walz - Communications Co-Chair

Paul Harrison - Diversity Chair

Annie Thym - Membership Co-Chair

Jennie Casavant - Membership Co-Chair

Dan Plummer - National Philanthropy Day Co-Chair

Michele Traband - National Philanthropy Day Co-Chair

Jen Davie - Professional Development Co-Chair

Lori Werbeckes, CFRE - Professional Development Co-Chair

Jennifer Jeffress Collins – Program Chair

Judy Brannstrom - Scholarship Chair

Sarah Linn – Young Professionals/Youth in Philanthropy Chair



2014 Annual Report

**AFP Greater Madison Chapter
Annual Meeting
December 16, 2014**

2014 Highlights

- The 2013-2015 three-year chapter Action Plan was developed and implemented by the AFP Greater Madison Chapter Board.
- Hosted 9 chapter meetings with educational presentations with an average of 55 people in attendance per meeting. 495 guests joined us over the year for these meetings.
- Facilitated four Networking Breakfasts in two locations, east and west, with up to 20 attendees per location.
- Held five webinars on a variety of timely topics and upgraded from an in-person to an on-line presentation format.
- Net increase of membership by 5% to 179 members. We have 39 new members and a retention rate of 73.5%.
- Attained Ten Star Status from AFP International for the ninth year in a row.
- Distributed \$2,050 in scholarships to 12 members for professional development.
- Posted 138 advertisements to the Jobs Board to provide service to the field for career advancement.
- Began a free workshop series targeted toward small non-profits.
- Offered bi-annual CFRE Review Course for 10 members.
- Increased Philanthropy Day sponsorship by 28% from 2013 raising an additional \$7,250, and hosted 434 guests in a sold out event at the Overture Center.
- Formed the Young Professionals/Youth in Philanthropy Committee which connected young professionals with member mentors, worked with the collegiate chapter, held a networking happy hour and promoted AFP to the next generation of fundraisers.

Thank you!

Be the Cause Campaign Honor Roll

The following chapter members helped us exceed our 2014 Be The Cause goal by 67%. Based on these gifts, the grant back to our chapter in 2014 will grow and benefit our membership even more!

Leah-Nell Adams
David E. Allen
Alliant Energy Foundation, Inc
Julie Bauer
Judith Brannstrom
Jennifer Jeffress Collins
Jen Davie
Adam Erdmann
Ashley Fletcher
Meghan Gauger
Terrie Goren, CFRE
Paul D. Harrison
Marcy Heim, CFRE
Nicole Hoffmann
Kirsten Houghton, CPA
Amy Kerwin
Sarah Linn
Daun Maier, CFRE
Renee Moe
Amy Overby
Jill W Pfeiffer
Dan Plummer, PHD
Cheryl Jean Porior-Mayhew
Kristi Shepard
Nicole Sparacino
Emma Starzewski
Robyn R. Tanke, CFRE
Annie Thym
Lizabeth Tolles
Michele Trabant, MA
Lori Werbeckes, CFRE
Shahla Miriam Werner, PHD
Chris Ziemba

2014 Chapter Leadership

Officers

President	Kirsten Houghton, CPA, MBA
President Elect	Nicole Hoffmann
Secretary	Lori Werbeckes, CFRE
Treasurer	Terrie Goren, CFRE
Immediate Past President	Dan Plummer, PhD

Committee Chairs

Communications Co-Chair	Cheryl Porior-Mayhew
Communications Co-Chair	Meghan Gauger
Diversity Chair	Paul Harrison
Membership Co-Chair	Adam Erdmann
Membership Co-Chair	Annie Thym
Nat'l Philanthropy Day Co-Chair	Dan Plummer
Nat'l Philanthropy Day Co-Chair	Michele Trabant
Professional Development Co-Chair	Amy Overby
Professional Development Co-Chair	Jen Davies
Program Co-Chair	Jennifer Jeffress Collins
Program Co-Chair	Julie Bauer
Scholarship Chair	Judy Brannstrom
Young Professionals/ Youth in Philanthropy Chair	Sarah Linn

Erin L. Richardson, Chapter Administrator

Mission

AFP Greater Madison is a partnership of people and organizations devoted to advancing ethical and effective philanthropy through education, professional development, networking and outreach.

AFP Greater Madison Chapter
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2013-2015 Action Plan Highlights

Goal I: Further the development and education of professionals.

- Objective 1: Provide quality and relevant monthly programs and webinars.
- Objective 2: Promote and facilitate sharing of knowledge among members at various levels.
- Objective 3: Provide the opportunity for chapter members to gain overall fundraising knowledge and the opportunity to earn CFRE credential.
- Objective 4: Co-host Conference/Workshop with Regional Colleagues.
- Objective 5: Ensure membership is aware of educational opportunities and pertinent research.

Goal II: Educate the public and raise awareness for our profession and our work.

- Objective 1: Increase awareness of our work in the community and media.
- Objective 2: National Philanthropy Day - increase media involvement and awareness of philanthropy. Consider ways that NPD could be used as a time for collective action.

Goal III: Deliver on member benefits.

- Objective 1: Membership will be informed of benefits available.
- Objective 2: Members will be aware of scholarship funding available for programs and professional development.

Goal IV: Build an inclusive AFP Madison Chapter membership that represents the diversity of the practitioners in our community.

- Objective 1: Represent and communicate the work of the AFP Madison Chapter's diverse practitioners and the work of organizations that serve diverse communities.
- Objective 2: Programming will be inclusive in order to serve our community.
- Objective 3: Chapter will work toward and apply for the Friends of Diversity Designation through IHQ.

Goal V: Prepare for the future by engaging young professionals and young people who are interested in philanthropy.

- Objective 1: Create awareness of philanthropy in next generation.
- Objective 2: Support, involve and collaborate with UW Collegiate Chapter.
- Objective 3: Educate young professionals new to the field.

Goal VI: Ensure a successful future for the AFP Greater Madison Chapter.

- Objective 1: Identify the opportunities (volunteer roles) for members to develop their skills as volunteer leaders.
- Objective 2: & 3: Grow membership & increase financial resources.

**AFP - Greater Madison Chapter
2014 Budget to Actual Results**

	Budget 2014	Actual as of 11/15/2014	Percentage Variance
Revenue:			
Philanthropy day sponsorships	16,000	32,450	51%
Philanthropy day registration	14,300	16,075	11%
Philanthropy day in-kind	8,125	8,125	0%
Monthly chapter program mtgs	11,550	9,631	-20%
Monthly chapter program sponsor	1,800	1,550	-16%
Webconferences	600	1,328	55%
Fundamentals of Fundraising	2,500	3,560	30%
Seminars/workshops/sponsorship	3,000	32,063	91%
Seminars/workshops in-kind	1,000	-	0%
Job board	3,000	4,320	31%
AFP member rebate	4,800	5,885	18%
EMC rebate/grant	275	402	32%
Networking breakfast	600	1,320	55%
Nakoma CC in-kind	3,400	3,400	0%
Other income	564	370	-52%
Total income	71,514	120,479	41%
Expenses:			
Philanthropy day	21,900	19,651	-11%
Philanthropy day in-kind	8,125	8,125	0%
Programs	10,384	8,886	-17%
Nakoma CC In-Kind	3,400	3,400	0%
CFRE	2,500	3,224	22%
Seminars/workshops	3,000	24,308	88%
Communications	100	-	0%
Scholarships	2,500	2,050	-22%
Membership	690	292	-136%
Diversity	550	-	0%
Administration	16,627	21,274	22%
Total expenses	69,776	91,210	23%
Net income / (loss)	\$ 1,738	\$ 29,269	

A Special Thank You to the 2014 Sponsors

Monthly Meeting Sponsors

Alliant Energy Foundation	SVA Certified Public Accountants, S.C
Forward Community Investments	The Employer Group
M3 Insurance	United Way Dane County Foundation
Nakoma Golf Club	

Wisconsin Fundraising Professionals Conference Sponsors

Presenting Sponsors

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National Philanthropy Day Sponsors

Presenting Sponsor

CUNA Mutual Foundation

Event Sponsors

Overture Center for the Arts
TASC

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Alliant Energy Foundation

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Madison Community Foundation • Madison Gas & Electric Foundation
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SVA Certified Public Accountants, S.C. • University of Wisconsin Foundation

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