



WISCONSIN
SOCIETY *for*
ORNITHOLOGY

WSO Annual Member Meeting - 2023



Welcome!

Year in Review

- ▶ Once again, no convention in 2022
- ▶ Wrapped up the first major fundraising effort for WSO operations
- ▶ Continued success with Honey Creek Birdathon/Bandathon
- ▶ Review of Needs Assessment Recommendations
- ▶ Board taking over governance/oversight duties:
 - ▶ Governance Committee (Chair: Lynn Barber)
 - ▶ Finance Committee (Chair: Davor Grgic)
 - ▶ Planning Committee (Chair: Sunil Gopalan)
- ▶ Staff working with volunteers to streamline WSO operations
 - ▶ Big Birding Bash
 - ▶ Virtual Programs
 - ▶ Online Haunts
 - ▶ Bird-safe glass

Secretary's Report

- ▶ See summarized board actions in handout

Governance Report

Committee Purpose: To review and provide recommendations to enhance the performance and quality of the Board of Directors

- ▶ Approved committee charter
- ▶ Conflict of Interest policy
- ▶ Board Manual
- ▶ Board Recruitment

Planning Report

Committee Purpose: Assist with refining organization's mission, vision and strategic direction

- ▶ Approved committee charter
- ▶ Strategic Planning Preparation

Finance Report

Committee Purpose: Help ensure that the WSO is in good fiscal health

- ▶ Financials review process
- ▶ Budgeting process
- ▶ Document retention policy
- ▶ Investment policy
- ▶ Accounting process review

Treasurer's Report

- ▶ See full report on financials in handout

UNRESTRICTED FINANCIALS

Income

Unrestricted Donations	\$62,632
Membership Dues	\$51,310
Other Income	\$3,130
Total	\$117,072



Expenses

Payroll	\$78,437
Publications	\$21,982
Administration	\$11,934
Schol/Grants	\$1,500
Membership	\$5,235
Other Expenses	\$5,318
Total	\$124,406



RESTRICTED FUND FINANCIALS

RESTRICTED FUND	2022 START	INCOME	EXPENSE	2022 END
Conservation Fund	\$10,124.80	\$4,620.00	\$0.00	\$14,744.80
Honey Creek Fund	\$43,825.33	\$33,081.00	(\$14,556.00)	\$62,350.33
Dischler Land Purchase	\$15,845.14	\$0.00	\$0.00	\$15,845.14
Scholarships & Grants	\$40,458.05	\$4.01	(\$1,500.00)	\$38,962.06
TOTAL	\$110,253.32	\$37,705.01	(\$16,056.00)	\$131,902.33

WSO ACCOUNT BALANCES

	2022	2021	2020	2019
Cash (unrestricted & restricted)	\$403,740	\$398,611	\$311,546	\$320,914
Inventory for Sale	\$1,066	\$1,065	\$2,896	\$5,138
Land	\$557,884	\$557,884	\$557,884	\$522,901
Mutual Fund Investments	\$153,086	\$173,954	\$152,157	\$138,695
Assets Held by Another Org	\$52,792	\$66,951	\$56,971	\$51,826
Total	\$1,168,568	\$1,198,465	\$1,081,454	\$1,039,473

2023 BUDGET

2023 Expected Revenue

Unrestricted Donations	\$68,000
Membership Dues	\$42,000
Publications	\$10,010
Other Income	\$1,100
Total	\$121,110

2023 Expected Expenses

Staff Expenses	\$83,000
Administration & Financials	\$14,200
Publications	\$17,000
Membership & Fundraising	\$7,000
Programs & Outreach	\$6,070
Total	\$127,270

Historian's Report

Nancy Nabak retired from Historian position after 7 years of dedicated work. Carl Schroeder appointed to be the new Historian.

Accomplishments:

- ▶ Established a document retention policy for governance, legal and financial records
- ▶ Began digitizing of most critical records

Plans:

- ▶ Complete backup set of Passenger Pigeon
- ▶ Establish document retention policy for bird observation records and begin digitizing
- ▶ Establish policy for past convention and conference materials, records of local bird clubs, memorabilia of prominent ornithologists, etc.



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2022 OPERATIONS REPORT

WSO BECOMES A PROFESSIONAL NONPROFIT

2022 YEAR IN REVIEW

- ❖ Executive Director onboarding
 - Administrative Assistant rehire
- ❖ New Board/Staff functioning
- ❖ WSO program and activity reviews
 - Past history and origins
 - Current status and leadership
- ❖ New programs but volunteer challenges

MEMBERSHIP 2022

Up 24 from one year ago

143 New Memberships

145 Lapsed Memberships

26 returned from lapsed

985 payments

63% online

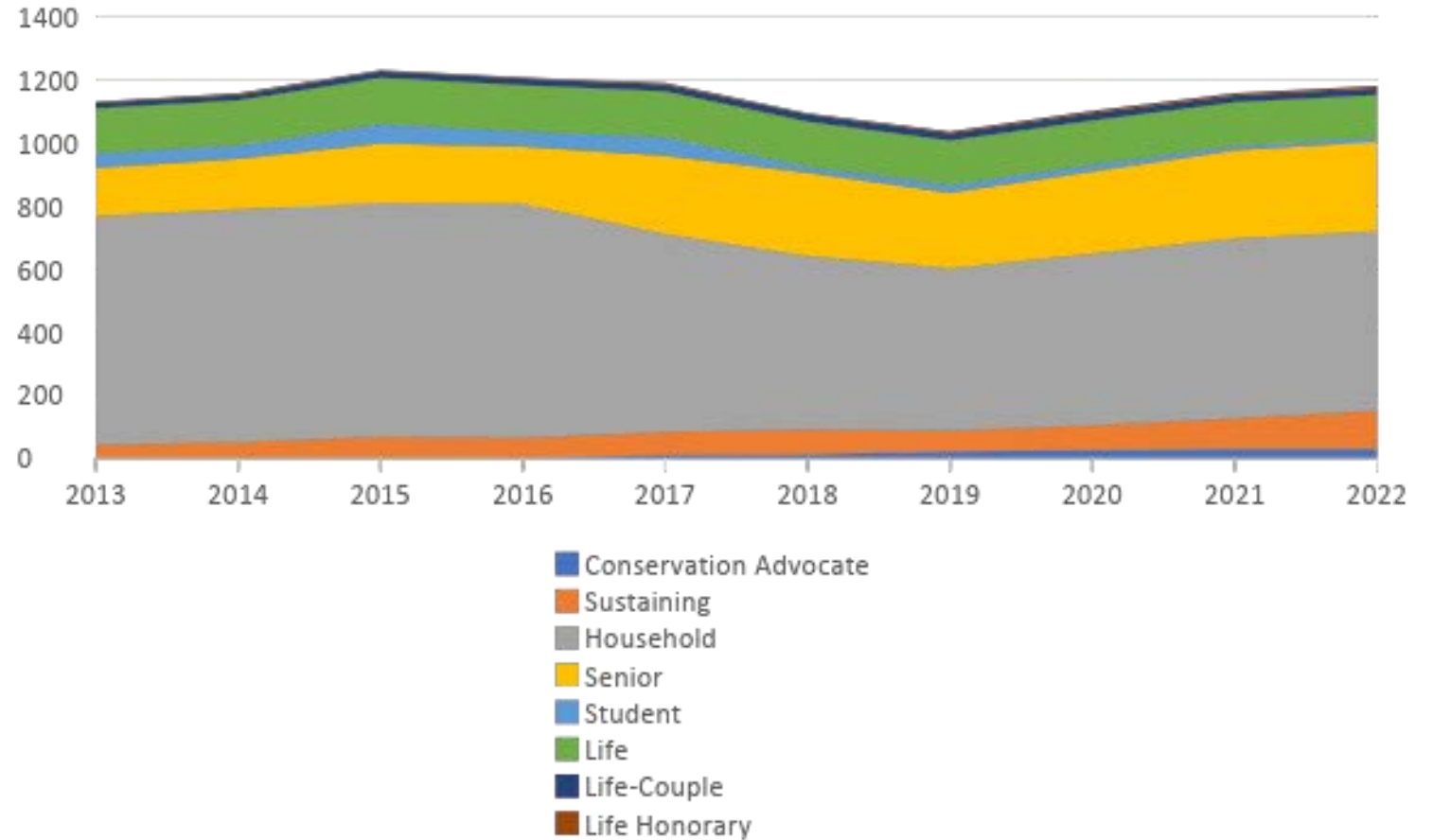
Membership Level	4 th Qtr 2022	3 rd Qtr 2022	4 th Qtr 2021
Conservation Advocate	27	28	27
Sustaining	122	109	98
Household	570	584	571
Senior	283	273	279
Student	14	13	14
Life	136	136	140
Life-Couple	20	20	20
Life-Honorary	9	9	8
Total	1,181	1,172	1,157
Paying annual dues	1,016	1,007	989

Membership 2022

10-Year View

Level	2013	2022	Change
Conservation Advocate	0	27	27
Sustaining	42	122	80
Household	726	570	(156)
Senior	152	283	131
Student	46	14	(32)
Life	143	136	(7)
Life-Couple	17	20	3
Life Honorary	5	9	4
TOTAL	1131	1181	50

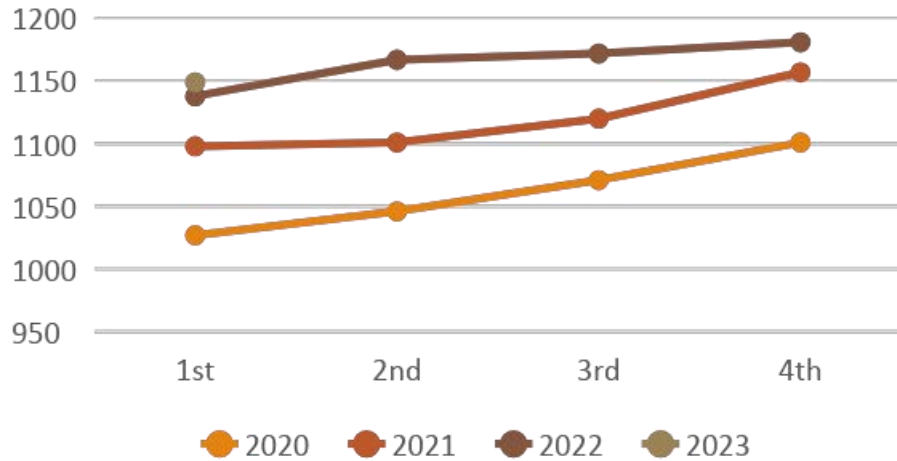
Membership By Year



MEMBERSHIP

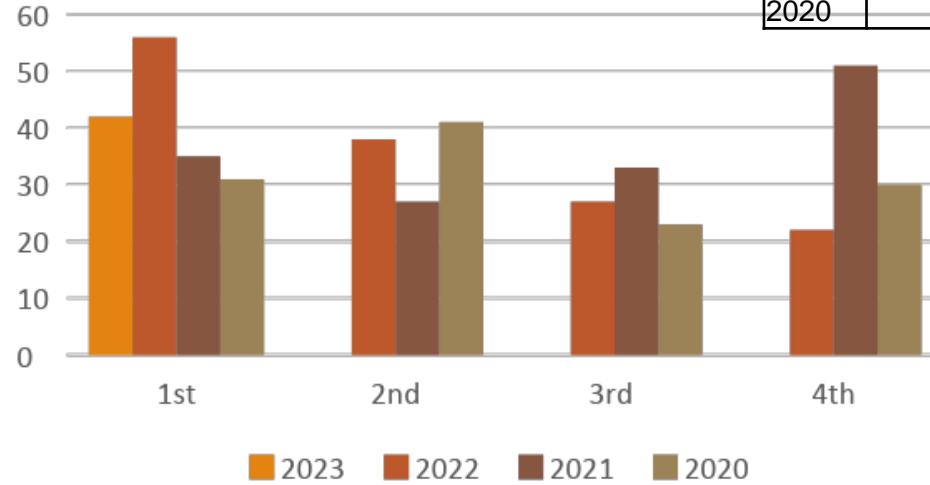
Membership Trends Over the Past Few Years by Quarter

Total Membership by Quarter



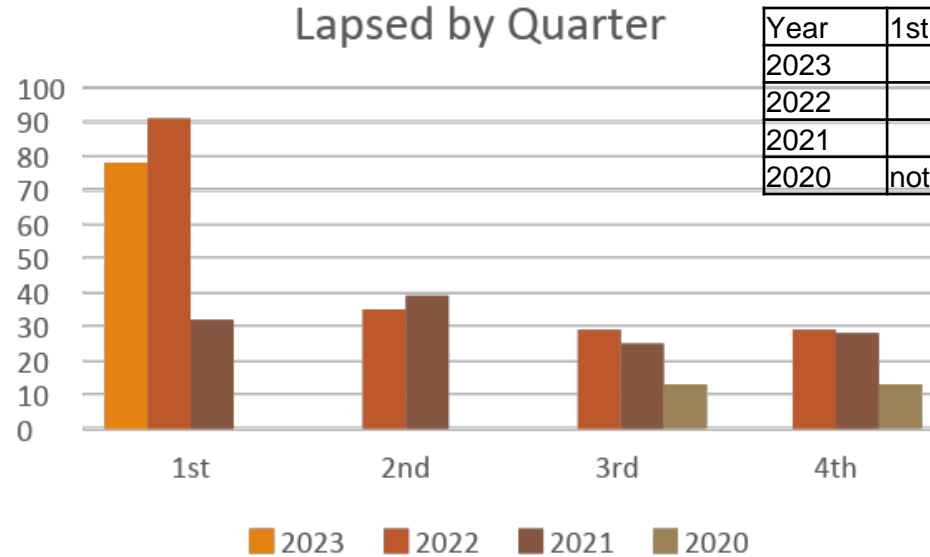
Year	1st	2nd	3rd	4th
2023	1149			
2022	1138	1167	1172	1181
2021	1098	1101	1120	1157
2020	1027	1046	1071	1101

New Memberships by Quarter



Year	1st	2nd	3rd	4th	TOTAL
2023	42				
2022	56	38	27	22	143
2021	35	27	33	51	146
2020	31	41	23	30	125

Lapsed by Quarter



Year	1st	2nd	3rd	4th
2023	78			
2022	91	35	29	29
2021	32	39	25	28
2020	not given	not given	13	13

FLIGHT FORWARD

GOAL OF \$150,000 by end of March 2022
Over 80% complete by end of 2021

Keystone Donor \$25,000	WSO Board and Volunteers \$40,000	WSO Members and Donors \$60,000	\$25,000 Raised in 2022
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FIRST APPEAL AT YEAR END

November 1, 2022 to January 17, 2023

TOTAL \$20,710

Amount	Donors	Total Amount
\$1000 or more	3	\$4,200.00
\$500-\$999	6	\$3,250.00
\$101-\$499	20	\$4,725.00
\$100	44	\$4,400.00
\$10-\$99	118	\$4,135.00
TOTAL	191	\$20,710.00

Average donation \$108

35% donations with membership

2022 Appeal by Number of Donors



- \$1000 or more
- \$500-\$999
- \$101-\$499
- \$100
- \$10-\$99

2022 Appeal by Donation Amounts



- \$1000 or more
- \$500-\$999
- \$101-\$499
- \$100
- \$10-\$99

2022 HONEY CREEK BIRDATHON/BANDATHON

FUNDRAISING

(As of June 30, 2022)

TOTAL \$19,096.00

BIRD WALKS

- Dawn Chorus – 42 species
- Loop hike – 50 species
- NEW - Later hike along creek

BIRD BANDING

- 32 species

VISITORS

- About 30

- ❖ About 120 Donors (10% of members)
- ❖ Largest donation \$5,000
- ❖ Average donation \$164
- ❖ Over budget projection of \$15,000



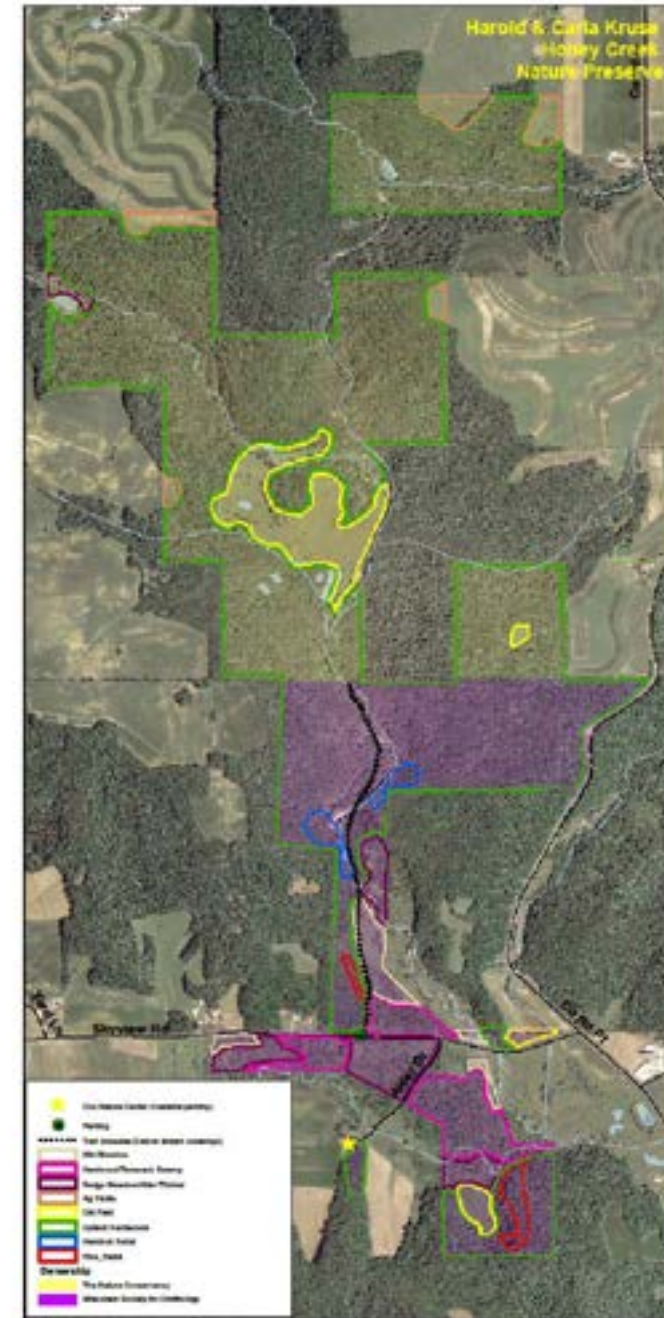
Honey Creek Preserve Land Management

First comprehensive surveys done of all parts of the current Honey Creek preserve.

Mike Mossman, Amy Staffen, and Angus Mossman working as volunteers to survey bird, plants and other wildlife to determine natural communities, condition, rarity and priorities.

Draft master plan expected to be completed in 2023 with DNR review needed (part of Honey Creek State Natural Area).

Decisions and implementation in late 2023 to 2024.



Honey Creek Preserve Operations

Invasives Management	<ul style="list-style-type: none">• Continued contract for invasive management• Targeted garlic mustard and Japanese knotweed
Volunteer Work	<ul style="list-style-type: none">• Trail maintenance• Downed tree removal from paths• Maintenance for nature center and outhouse• Tried garlic mustard work days, but few volunteers
Property Maintenance	<ul style="list-style-type: none">• Sold log cabin underneath Cox House• Covered costs of removing/burying the remainder

WSO & BIRDING

BIG BIRDING BASH

- 635 checklists
- 87 users, 328 observers
- 244 species, 59 counties
- Compare to 2022 GWB 56 teams, 250 species, 36 counties

VIRTUAL PROGRAMS

- WBBA II Update
- Driftless Area Bird Conservation
- Connecticut Warbler Conservation
- Project SOAR
- 2 eBird classes

WSO WEBSITE UPDATE



ONLINE HAUNTS COMPLETED

- Over 800 sites in all 72 counties
- 110 contributors (all given access)
- New bookmark promoting Haunts

Field Trip Locations

- Buena Vista Grasslands
- George Mead Wildlife Area
- Goose Pond
- Green Bay Fall Migration
- Harrington Beach Hawk Watch
- Horicon Marsh NWR
- Lake Michigan Ducks
- N Kettle Moraine SF
- Sheboygan
- S Kettle Moraine SF
- White River Marsh



Grants - \$500 Each



Tracking the phantoms:
A Red-Shouldered Hawk
Telemetry Study

Photo by Gene Jacobs

Project SOAR
*Winnebago and
Northeastern
Wisconsin Audubon*



Bird Monitoring at Restoration Sites
on the Oneida Nation Reservation

Conservation Committee Report

- ▶ Jennifer Lazewski – Co-chair
- ▶ Rebecca Gilman – Co-chair
- ▶ Members: Davor Grgic, Jack Coulter, Mark Martin, Peter McKeever,
- ▶ Ron Eckstein, Tom Prestby, Sue Knaack, Deb Turski, Bill Volkert,
- ▶ Lynn Barber

BIRD-SAFE GLASS

CHAMPION: Peter McKeever

POSITION: WSO supports building codes and ordinances that require the use of bird-safe glass in new construction and supports the voluntary use of practices that make existing glass safer to birds.

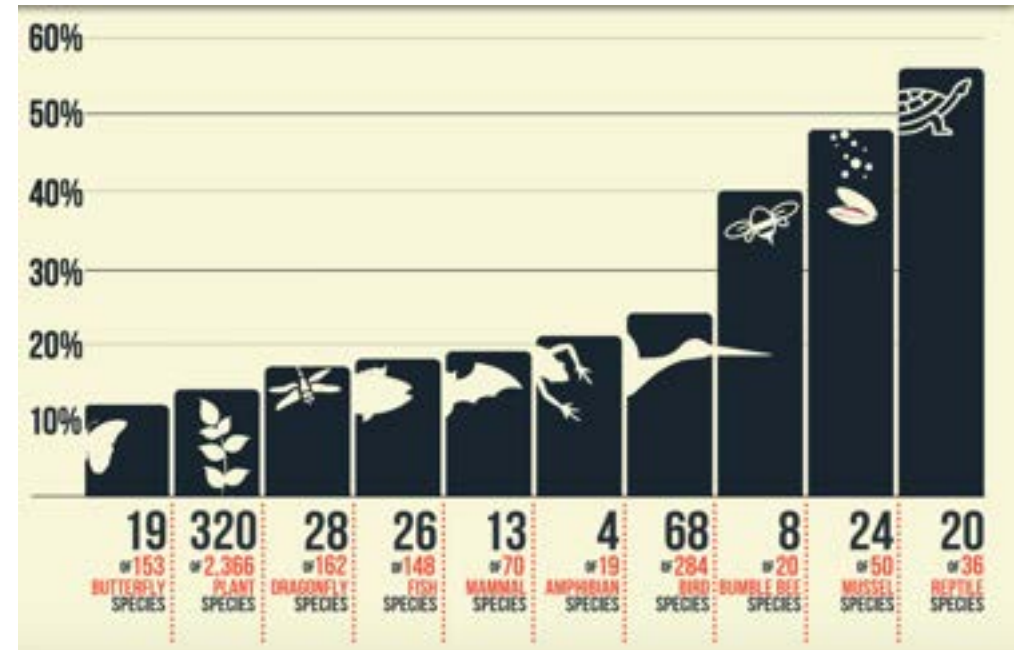


RECOVERING AMERICA'S WILDLIFE ACT

CHAMPION: Carl Schroeder

POSITION: WSO supports the approval of the Recovering America's Wildlife Act (RAWA) by Congress. RAWA would bring \$18 million annually to Wisconsin to help save over 400 threatened wildlife species by granting federal funding to priority conservation projects in our state – all with no new or increased taxes.

WISCONSIN NATIVE SPECIES AT RISK:
BY THE NUMBERS



NO LEAD

CHAMPION: Sue Knaack

POSITION: WSO supports the promotion of the use of no-lead ammunition and fishing tackle. WSO opposes the use of lead ammo and tackle on national and state wildlife refuges.



CONNECTICUT WARBLER AND GREATER PRAIRIE CHICKEN CONSERVATION

CHAMPIONS: Carl Schroeder, Dr. Peter Dunn, Ron Eckstein, Jennifer Lazewski

POSITIONS: WSO supports the DNR's prioritization of habitat management for the Connecticut Warbler and WSO supports the 2022 Greater Prairie Chicken management plan.



Photo by Brian
Collins



ONGOING PRIORITY ISSUES

Knowles-Nelson Stewardship Fund: WSO supports the unimpeded allocation of Knowles-Nelson funds, in particular those awarded to the Pelican River Forest Project. WSO opposes any restrictions on grant applications that aim to protect land north of Highway 8, which runs the length of the state through Rhineland.

Kohler Co. Golf Course: WSO opposes the development of the land lying north of Kohler-Andrae State Park, which is in an IBA for migratory birds.

Columbia Power Plant Land Preservation: WSO supports the efforts of a coalition of conservation organizations to work with Alliant Energy to preserve the land of the Columbia Power Plant.

Cat Predation of Birds: WSO supports the education of cat owners about the impact of outdoor cats on bird populations and encourages the practice of keeping cats indoors. WSO opposes the practice of Trap, Neuter, Release (TNR).

Diversity, Equity, and Inclusion: WSO believes that as a whole, our membership wants us to protect the birds we love and the best way to do that is to engage with more people and especially so by supporting the involvement of historically marginalized communities with the appreciation of the natural world.

Membership Dues Resolutions

1. WSO annual membership dues will be revised as follows:

Membership Level	Current Dues	Revised Dues	Digital Publications	Paper Newsletter	Paper Journal
Conservation Champion	N/A	\$1000	Included	Included upon request	Included upon request
Conservation Defender	N/A	\$500	Included	Included upon request	Included upon request
Conservation Advocate	\$200	\$200	Included	Included upon request	Included upon request
Sustaining	\$100	\$100	Included	\$10 fee	\$15 fee
Household	\$40	\$40	Included	\$10 fee	\$15 fee
Introductory (2 year limit)	N/A	\$25	Included	\$10 fee	\$15 fee
Senior	\$25	No longer	N/A	N/A	N/A
Student	\$25	No longer	N/A	N/A	N/A

Membership Dues Resolutions

2. Donations in the amount of at least Household level dues will grant membership privileges to a donor.
3. A \$10 annual paper subscription fee must be paid to receive a paper copy of the *Badger Birder* newsletter if a membership contributes less than \$200 in annual dues or donations. This includes Life and Life-Couple members (but not Honorary Life members). The subscription date renewal will match membership renewal for non-Life memberships regardless of starting date.
4. A \$15 annual paper subscription fee must be paid to receive a paper copy of the *Passenger Pigeon* journal if a membership contributes less than \$200 in dues or donations. This includes Life and Life-Couple members (but not Honorary Life members). The subscription date renewal will match membership renewal for non-Life memberships regardless of starting date.
5. The amounts charged for paper publication subscriptions are not a part of membership dues. The Board of Directors can change amounts charged for subscription fees (including library subscriptions for the *Passenger Pigeon* journal). The Board can also change the level of members/donors that receive paper publications without a separate subscription fee.
6. Since WSO is generally increasing its efforts on bird conservation as well as other parts of the WSO mission, all levels of membership dues will go towards WSO's unrestricted rather than restricted funds. Donors may still choose to give directly to restricted funds.

WSO Board Updates

- ▶ New on the board: Chrissie Lindemann
- ▶ Renewed: Carl Schroeder, Steve Holzman, Dar Tiede, Tom Schultz
- ▶ Stepping down: Carl Schwartz
- ▶ Stepped down in the last year: Nancy Nabak, Mary Korkor

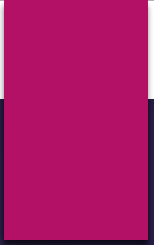
Looking Ahead

An unconventional way to engage in person

Strategic planning

- A brand new plan to help direct a renewed organization
- We want to deliver value and results. Help us reflect on what to:
 - Preserve
 - Adapt
 - Set aside
- Expect us to reach out starting in June

Board development – do you have non-profit board/finance experience?



Thank
you!