



WISCONSIN
SOCIETY *for*
ORNITHOLOGY

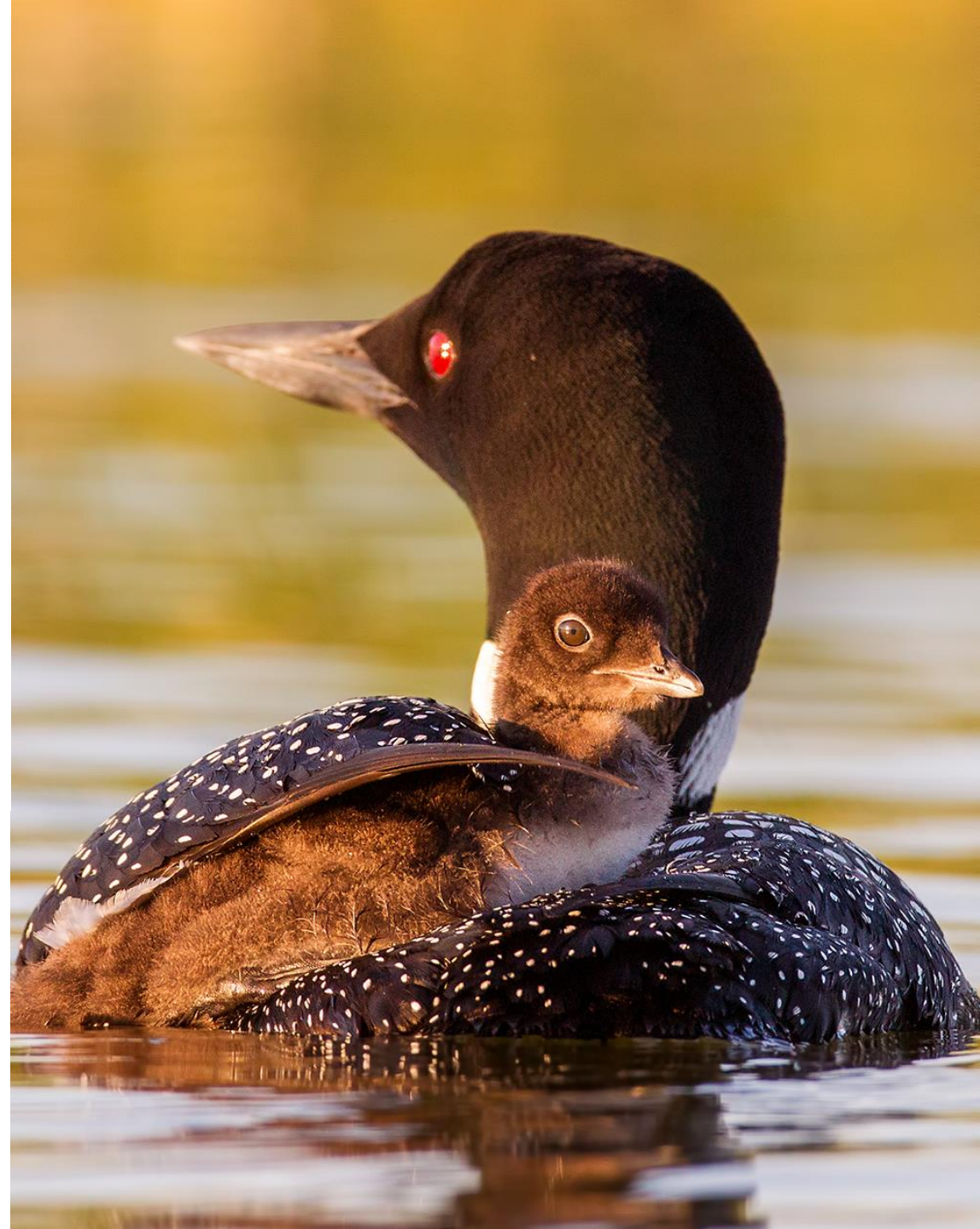


Presentation



Handout

WSO Annual Member Meeting 2024



Welcome!



meeting outline



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Year in Review



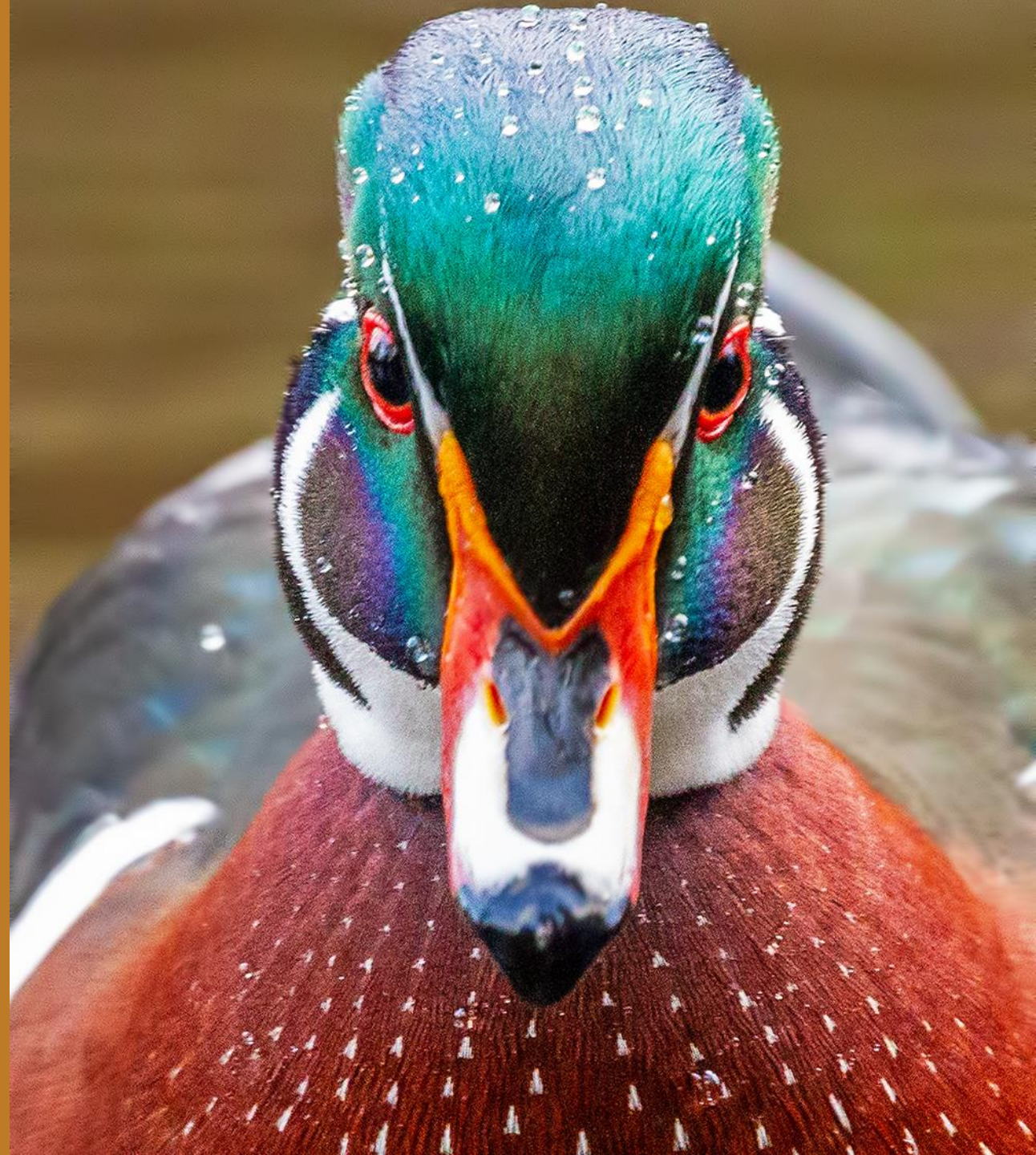


2023 accomplishments

- ❖ Well attended 2023 annual convention in Waukesha (150+ registered attendees)
- ❖ Membership changes implemented
- ❖ First annual Fall Fundraiser concluded (200+ donors, \$38K raised)
- ❖ Continued success with Honey Creek Birdathon/Bandathon
- ❖ WSO Unconvention and representation at other events and press
- ❖ Significant enhancements to managing finances
- ❖ Approved Strategic Plan Framework to take WSO into the future

02

Board Reports





- ❖ Secretary's Report (Rebecca Gilman)
- ❖ Committee Reports
 - ❖ Governance (Chair - Lynn Barber)
 - ❖ Planning (Chair - Sunil Gopalan)
 - ❖ Finance (Chair - Davor Grgic)
- ❖ Treasurer's Report (Dani Baumann)
- ❖ Historian's Report (Carl Schroeder)

Secretary's Report

See summarized board actions in handout for more detail

January Board Meeting Highlights

- Partnering to present at Bringing Birds Back
- Support of Pelican River Forest Project
- Cox House Disposal

April Board Meeting Highlights

- Strategic Planning contract signed
- Support of Madison Bird-safe glass ordinance
- Stewardship funding issues discussed

July Board Meeting Highlights

- Honey Creek fencing progress
- Membership Dues changes implemented
- HCBB fundraising report
- Strategic Planning Update

October Board Meeting Highlights

- Unconvention Details
- Honey Creek land management plan update
- Fall fundraising appeal plans
- Strategic Planning Update

Governance Report

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

Recruitment

Continued publicity for new Board Member Recruitment

Job Descriptions

Updated Treasurer job description in coordination with Finance Committee

Ongoing Board Management

- Managing term limits
- Review Conflict of Interest submissions
- Review Board self-evaluations



Planning Report

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

Strategic Planning

Most of our efforts this year revolved around facilitating the Strategic Planning Framework which was approved by the Board during the April 2024 Board Meeting. Details to follow.

Finance Report

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

Financial Management System

Completed migration of all operating financial records and transactions to QuickBooks, a system widely used in small non-profits. This improves overall transparency of WSO finances and enables more secure and standardized financial records management

Financial Controls

Established additional financial controls including regular third-party reviews and segregation of duties/roles between Treasurer and staff.

Reporting Systems

Enabled by QuickBooks, implemented a more standardized and automated process for generating quarterly & monthly financial reports

Investments

Invested additional reserve funds in high yield money market funds and a conservative mutual fund to generate additional income.

Treasurer's Report

See full report on financials in handout

2023 Summary

Unrestricted Revenue	\$ 141,874	Restricted Revenue	\$ 39,958
Unrestricted Expenses	\$ (139,737)	Restricted Expenses	\$ (21,152)
Total Unrestricted Income	\$ 2,137	Total Restricted Income	\$ 18,806

Account Balances

	2023	2022	2021	2020
Cash	198,374	403,740	398,611	311,546
Inventory for Sale	471	1,066	1,065	2,896
Land*	557,884	557,884	557,884	557,884
Mutual Fund Investments	404,585	153,086	173,954	152,157
Assets Held by Another Org**	47,661	52,792	66,951	56,971
Total	1,208,974	1,168,568	1,198,465	1,081,454

Historian's Report

Passenger Pigeon Archives

Secured two complete sets of the Passenger Pigeon. Located now at

- UWGB Archives
- Historian's residence

A third incomplete set is also in the UWGB archives.

Record Preservation

- A water and fireproof safe now in the UWGB Archives.
- Deeds, abstracts and other property records for Honey Creek and Buena Vista moved here.
- All these records also digitized.

Record Digitization

- Records regarding the history of Buena Vista property digitized for work on the Prairie Chicken management plan.
- Records regarding the history of Honey Creek property digitized for work on Honey Creek management plan.
- Board of Director meeting minutes and Secretary correspondence from 1955-1962 digitized.

Other

Located W. E. Snyder field journals from 1988-1940 and the inventory of Rogers zoological collection in the State Historical Society archives at UWGB. These will be transferred to SHS in Madison so that Mossman can access them and begin transcription.

Future Plans

- Locate BOD minutes from 1939-1954 in State Historical Society archives and digitize.
- Archive Treasurer's records.
- Establish document retention policy for bird observation records.
- Establish policy for past convention and conference materials, records of local bird clubs, memorabilia of prominent ornithologists, etc.

03

Operations Report



WSO IN ACTION

WSO continues building infrastructure while engaging members in birding activities and leading volunteers and other birding organizations in conservation efforts statewide.



BRINGING BIRDS BACK CONFERENCE



- The conference was very successful with 140 registered and 130 attending
- Joint effort with WBCP, Bird City WI & WSO
 - 63 registrants (45%) were WSO members
- 22 presentations plus wrap up
- Introduction of Save Our Songbirds
- WSO leadership was instrumental to the success of the conference
 - WSO Executive Director managed the venue, catering, speaker tech, and the speaker section on residential habitat for birds.
 - WSO has handled event registration and payments in its system. 95% of pre-conference payments were online (significant shift).

WSO CONVENTION

MAY 19-21 WAUKESHA

- ❖ First convention after 3 year absence
- ❖ 150 pre-registrations with 4 cancels
- ❖ 8 walk-ins
- ❖ 147 attended, some only Friday
- ❖ Friday merger of picnic/awards, crowd size required location move
- ❖ Field trips 88 signed up Saturday and 62 on Sunday
- ❖ Keynote/banquet 99 reservations



HONEY CREEK BIRDATHON/ BANDATHON

BIRD WALKS - 64 species

- Dawn Chorus - 45 species
- Along Skyview Road
- Loop hike X 2 - 55 species

BIRD BANDING - 45 individual birds

- 15 species new
- 6 species recaptures

VISITORS

- About 40



WSO UNCONVENTION

NOVEMBER 11

UW-MADISON ARBORETUM

- ❖ First ever fall casual event
- ❖ 99 registrations, 83 paid
- ❖ Over 90 attended



- "PEOPLE IN WISCONSIN
- TALKING ABOUT BIRD STUFF"

- ❖ UW-Arboretum birder Chuck Henrikson
- ❖ Student posters and "mini breaks"
- ❖ eBird tips & tricks at two levels
- ❖ Mossman & Prestby on restoration projects
- ❖ Lynn Barber on "Joy of Birding"
- ❖ Kestrel and Purple Martin monitoring
- ❖ Book recommendations

WSO PUBLIC OUTREACH

Executive Director featured in Milwaukee Journal Sentinel article then distributed statewide

Also several rare bird articles by Paul Smith that featured WSO members



PBS GARDEN & LANDSCAPE EXPO FEB 9-11

- WSO Booth, placed with SOS Save our Songbirds and Lake Michigan Bird Observatory

PRESENTATIONS

- Pollinator Gardening to Bird Habitat attended by more than 200 with many 5 out of 5 reviews
- Also Bird Gardening in last session spot
- Pollinator Gardening to Bird Habitat also done for 60 people with Friends of Horicon Marsh



BADGER BIRDER

- ❖ No new volunteer editors, staff now manages it
- ❖ Changes to length, articles and features due to staff priorities and capacity
- ❖ Graphics switched to simpler platform
- ❖ Email open rate at 71-78% with click through of 21-28% (down only slightly from past version)
- ❖ Number of paper copies at 346 (down 40)

ISSUE #744 DECEMBER 2023

THE BADGER BIRDER

Newsletter of the Wisconsin Society for Ornithology



First WSO Unconvention A Success

By Jennifer Lazewski, WSO Executive Director

WSO's first off-season informal gathering of birding enthusiasts filled the UW-Madison Arboretum program room for a fun and educational day on birds, restoring bird habitats, and science-based conservation efforts. While the WSO convention emphasizes exploring birdy areas with field trips during prime migration time, the "unconvention" creates an indoor program experience after fall migration when birders have more time. For this first year, the program was an eclectic collection of bird-related topics we called "People in Wisconsin Talking About Bird Stuff."

The shorter programs, mix of topics, open mike periods, and time to get out of our seats and chat provided a great atmosphere for fun learning and passionate conversations about birds. Over ninety (90) people attended, and the room buzzed with conversation at every opportunity. Four students from UW-Madison and UW-Stevens Point presented posters and did a great job talking to attendees about their research. People couldn't get enough about eBird, and both sessions ran overtime as the presenters shared many tips and tricks to help provide the best data and get the most out of eBird.

People loved a chance to learn more and talk about birds when they had more time, so WSO plans to continue the Unconvention next fall at a new location. Watch for an announcement in the coming months.



(Above) Attendees enjoy Tom Prestby's program on Cat Island; (Left) Maia Persche and Karen Etter Hale; (Right) Brand Smith and Sharon Weisenberg in front with Shannon and Cristo Ruiz behind.



Photos by Rebecca Gilman

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PASSENGER PIGEON

- ❖ Process review led by Executive Director with board members
 - ❖ Difficulty keeping on schedule, no volunteer editor succession
 - ❖ Turnover of seasonal field report editors
 - ❖ Discussions with board and publications advisory group
 - ❖ Longtime printer bought out, staff managed transition to new
 - ❖ Attempted to manage with staff, but other priorities kept coming up and staff do not have the skills to evaluate and edit most articles
 - ❖ Dr. Robert Jadin from UWSP taking over editorial duties with other volunteer and staff assistance
-

MEMBERSHIP 2023

122 New Memberships

154 Lapsed Memberships

38 or so returned from lapsed

Down 37 from one year ago

BUT

48% increase in Conservation

39% increase in Sustaining

985 membership payments

Level	2023	2022	2021
Conservation Champion	1		
Conservation Defender	1		
Conservation Advocate	38	27	27
Sustaining	136	122	98
Household	651	570	571
Introductory	17		
Senior	130	283	279
Student	10	14	14
Life	130	136	140
Life-Honorary	10	9	8
Life-Couple	20	20	20
TOTAL	1,144	1,181	1,157

MEMBERSHIP 2013-2023

Total memberships similar to 2013, but significant shift up in membership level and annual dues payment.

3X increase for Sustaining level or higher.

Seniors increased in between to a high of 279 after 2017 dues change cost increases

Level	Dues	2023	2013	10-Year Change
Conservation Champion	\$1,000	1		1
Conservation Defender	\$500	1		1
Conservation Advocate	\$200	38		38
Sustaining	\$100	136	42	94
Household	\$40	651	726	(75)
Introductory	\$25	17		17
Senior	\$25	130	152	(22)
Student	\$25	10	46	(36)
Life	No annual	130	143	(13)
Life-Couple	No annual	20	17	3
Life-Honorary	None	10	5	5
TOTAL		1,144	1,131	13

MEMBERSHIP

MARCH 2023 TO 2024

- 31 New Memberships
 - 9 Introductory
- 104 Lapsed Memberships
 - Includes largest renewal group for end of year
 - 43 Senior & Student level
- Total 21 Memberships by gifts
- Dues changes conclude by end of June 2024

Level	3/31/2024	12/31/2023 (one quarter ago)	3/31/2023 (one year ago)
Conservation Champion	1	1	0
Conservation Defender	2	1	0
Conservation Advocate	47	38	28
Sustaining	130	136	121
Household	668	651	558
Introductory	27	17	0
Senior	37	130	266
Student	5	10	12
Life	130	130	135
Life-Couple	20	20	20
Life-Honorary	11	10	9
TOTAL	1,078	1,144	1,149

04

Conservation Report





Committee Members:

- ❖ Jennifer Lazewski - Co-chair
- ❖ Rebecca Gilman - Co-chair
- ❖ Mark Martin
- ❖ Peter McKeever
- ❖ Ron Eckstein
- ❖ Davor Grgic
- ❖ Tom Prestby
- ❖ Sue Knaack
- ❖ Deb Turski
- ❖ Bill Volkert
- ❖ Lynn Barber
- ❖ Chrissie Lindemann
- ❖ Lowell Suring

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.



Connecticut Warbler and Greater Prairie Chicken Conservation

Champions: Lowell Suring, Jennifer
Lazewski, Ron Eckstein

Positions

- ❖ WSO supports the DNR's prioritization of habitat management for the Connecticut Warbler
- ❖ WSO supports the 2022 Greater Prairie Chicken management plan



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.



Loon Necropsy.
Photo courtesy US Fish & Wildlife Service



Knowles- Nelson Stewardship Fund

Champions: Rebecca Gilman
and Jennifer Lazewski

Position

WSO supports the unimpeded allocation of Knowles-Nelson funds. WSO opposes any restrictions on grant applications that aim to protect land north of Highway 8, which runs the length of the state through Rhinelander.



Ongoing Priority Issues

Columbia Power Plant Land Preservation

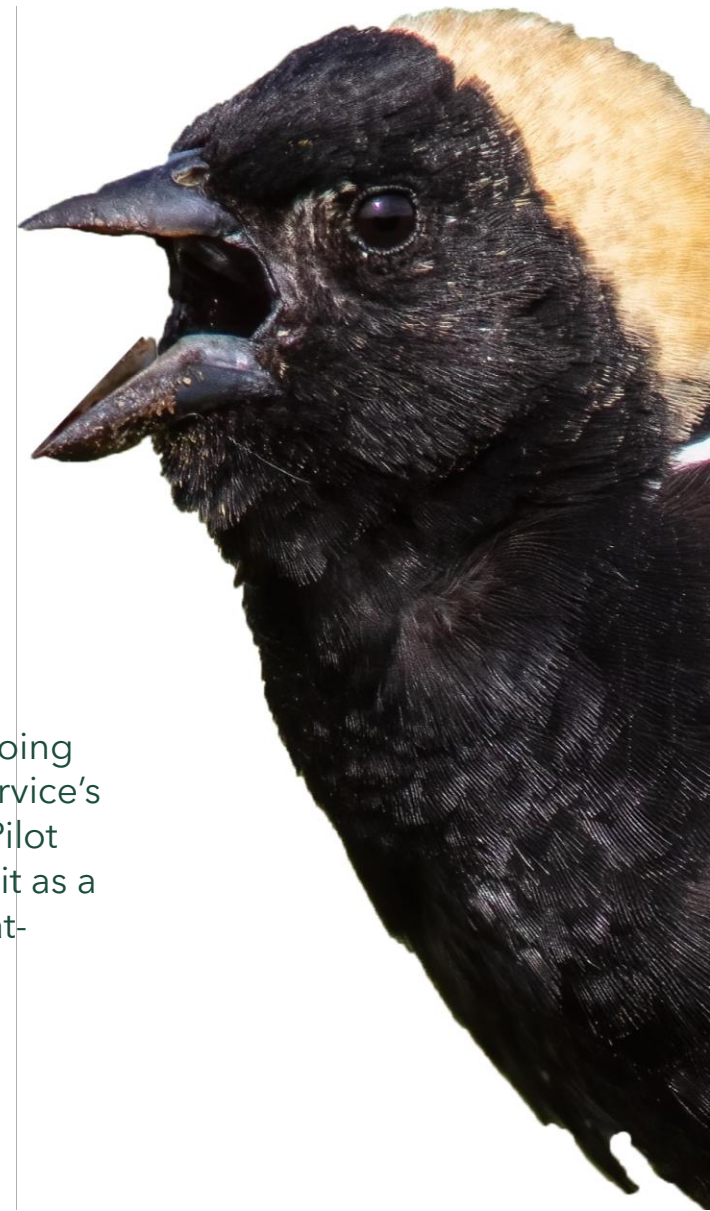
WSO supports the efforts of a coalition of conservation organizations to work with Alliant Energy to preserve the land of the Columbia Power Plant.

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).

Pilot Island

WSO supports the ongoing US Fish and Wildlife Service's management plan for Pilot Island which preserves it as a nesting colony for Great-crested Cormorants.



Ongoing Priority Issues .. contd

Sandhill Crane Hunts

WSO opposes the hunting of Sandhill Cranes.

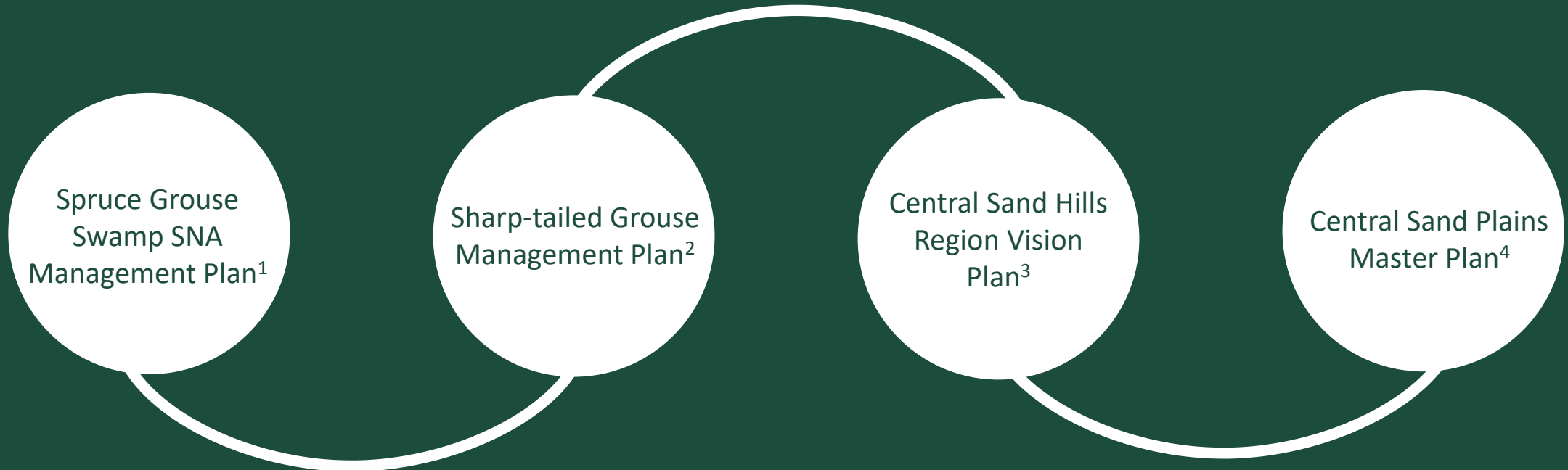
Kohler Co. Golf Course

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



In addition ...

WSO submission of comments to the Department of Natural Resources or Natural Resources Board



1. Draft Interim Forest Management Plan for the Spruce Grouse Swamp State Natural Area (DNR)
2. Sharp-tailed Grouse Management Plan (NRB)
3. Draft vision plan for the Central Sand Hills Region (DNR)
4. Central Sand Plains Master Plan (NRB)

05

Board Changes





- ❖ New on the board
 - ❖ Melissa Kesling
- ❖ Renewed board terms
 - ❖ Dan Pickarts
 - ❖ Sunil Gopalan
- ❖ Departed in previous year
 - ❖ Jack Coulter
 - ❖ Jeff Baughman
 - ❖ Greg Bisbee
- ❖ Departing at the end of term
 - ❖ Tim Hahn
 - ❖ Davor Grgic
 - ❖ Quentin Yoerger

06

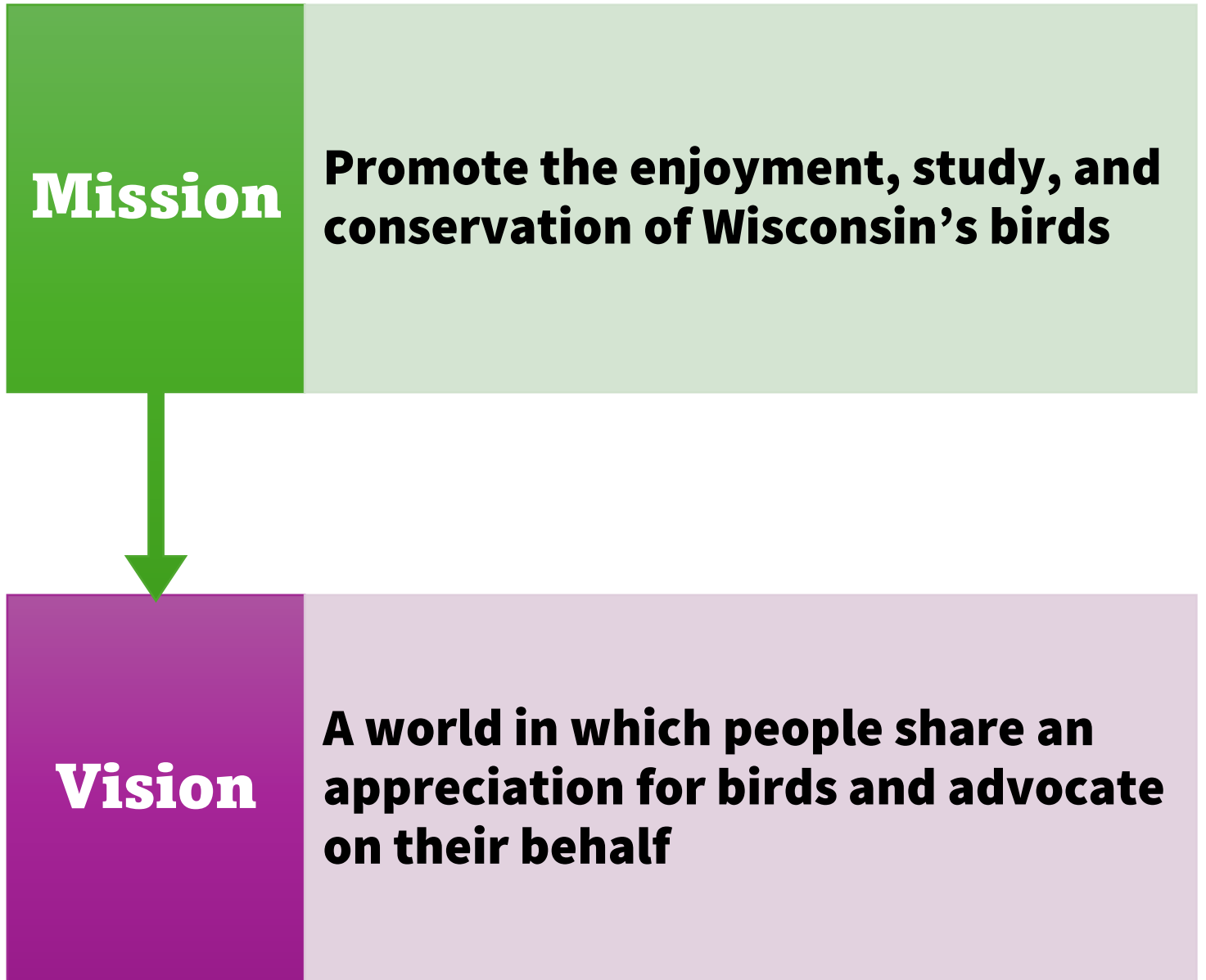
Strategic Planning Framework





- ❖ Strategic Planning Framework Approved!
- ❖ Updates to Mission, Vision, Values
- ❖ Thank you to all of you that participated in this process

We come together with shared purpose and intent



We work together in the spirit of shared values

The natural world, including birds, has innate value.

Conservation of birds and their environments is vitally important.
Birds are an integral part of a healthy food chain and a healthy ecosystem.
The viability of bird populations is a critical indicator for the health of the earth.

Caring for humanity involves caring for birds.

Preserving bird habitats enhances our quality of life.
Enjoying birds builds our sense of wonder about the world.
Birdwatching helps us understand our shared responsibilities to protect the natural world.

Birdwatching contributes to a sense of connection and well-being.

Observing birds in their natural habitat encourages presence and mindfulness.
Observing birds with others instills a sense of shared appreciation and community.
Observing birds in the wild fosters a sense of responsibility to protect their habitats.

Birding knows no bounds.

All are welcome to experience the wonder of birds and birding.
Shared experiences and sharing of resources support a stronger future for birds.
The study of birds benefits from history, experience, and advancement of diverse ideas.

**We're at a
crossroads
to remain
relevant
and be
sustainable**

- Need to attract people under 55 years of age without alienating the current majority of (older) members
- Need to establish a niche for the organization without losing its legacy
- Need to meet non-ornithology people where are to bring them into the fold and inspire their journey
- Must sunset efforts that are less relevant or redundant in current times
- Must get money from a wider variety of sources to assure affordable dues and activities



Be the voice for bird conservation



Double down on engaging new people of diverse backgrounds in the study of birds



Recommit to Honey Creek as an asset for the organization and for studying birds



Uphold education and information sharing through our networks

Our intentions build on our assets and meet needs of both members and the broader community

We're Ready for the Future





Volunteer Recruitment and Stewardship



Diversification and Deepening of Funding Streams



Outreach and Communication



Engagement and Advocacy

**We will focus
in these areas
to enhance
our impact**



Build organizational strength and stability



Inspire ambassadors and advocates



Garner resources and influence

**These
strategies
will guide
our progress**



Our Goal

By 2030, those who engage with the Wisconsin Society for Ornithology will reflect people of diverse ages and experiences who enjoy coming together to experience birds and share a sense of responsibility to advocate on behalf of birds for their preservation.



Our Objectives

Near-Term

- Strengthen the organizational infrastructure with staff bolstering enjoyment and conservation efforts and volunteers advancing ornithological pursuits and study
- Leverage Honey Creek as a place for people to experience the joys of birding and value of habitat preservation

Mid-Term

- Work collaboratively with other groups to spread the joy of birds across demographics and communities
- Activate members as supporters, educators, ambassadors, and advocates to engage others

Long-Term

- Mobilize diverse groups of people to advocate for research and preservation of bird habitat in Wisconsin
- Tap into the energy of the generations who want to maintain healthy ecosystems



We are organizing volunteer groups to advance efforts

**Honey Creek
Planning/
Management Team**

**Expanded
Communications
Committee**

**Brand Experience
Task Force**

Events Committee

... along with the current array of opportunities!

**We're excited
to move forward
together**



07

Officer Elections





- ❖ Process
- ❖ Nominations Committee
 - ❖ Dar Tiede (Chair)
 - ❖ Chrissie Lindemann
 - ❖ Katie Fisher

Proposed Slate

WSO Elected Officers 2024-2026

President



Lynn Barber

Current WSO Vice
President

Vice President



Steve Holzman

Current WSO Board
Member

Secretary



Carl Schroeder

Current WSO Board
Member



contact info

<https://wsobirds.org/about-wso/board-members>

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