



Fund Development Plan 2014-17

GOALS:

- ♦ Institutionalize gratitude and stewardship
- ♦ Create a compelling case statement for the TREE Fund
- ♦ Raise \$1M annually for operations (operations includes program awards budget)
- ♦ Diversify revenue streams to reduce dependence on special events fundraising
- ♦ Facilitate completion of fundraising for three endowment funds by 2017
suggested: Appleton, Barborinas, Skiera Funds
- ♦ 100% Trustee participation in Heritage Oak Society by 2017

OBJECTIVES:

A. Maximize the ROI of our special events

Keep the focus on funding our mission and infrastructure

- Annual Revenue goals (includes sponsorships and fundraising)
 - STdT: \$625,000
 - Raise Your Hand for Research Auctions: \$115,000
- Sponsorship (TREE Fund and special events): \$300,000 cash/year
 - Propose Partner-level support (\$15K cash/\$10K in-kind) to ISA Conf. Host Chapters
 - Cultivate local tree care and utility sponsors for STdT and RYH4R
 - Expand event sponsorship recognition opportunities:
 - \$2500 level:
 - Tour lunches, rest stops, mechanical support
 - Auction food, games
 - \$5,000 level:
 - Tour education programs, dinners
 - RYH4R Host, Researcher Reception
 - \$10,000
 - Tour vehicles, PSA
- Program value:
 - Incorporate 7 Pricklethorn events/year into STdT
 - Continue STdT library book donation program
 - Continue to develop and promote Researcher Reception at Live Auction
- Volunteers:
 - Enlist local volunteers for STdT and RYH4R
 - Build relationships with volunteers post-event to keep them as TF supporters
- Donor recognition/cultivation
 - Use Donor/Sponsor recognition protocols to recognize major supporters

B. Grow the Annual Appeal as a revenue and outreach opportunity

10% increase in revenues p/year

Strategies TBD following analysis of 2014 campaign



C. Cultivate/steward major donors

- Thank, recognize and retain current donors
- Prospect, cultivate, ask and steward new donors
 - Tailor the ask to their interest/priorities where appropriate

D. Collaborate strategically with our Endowment Fund partners to support their fundraising

- Support locally-led major gift campaigns for Appleton, Barborinas, Skiera Funds
- Current funding levels/goals, potential partners:
 - Appleton: \$38,300/\$100,000, MAC-ISA (Golf Outing), Trees VA, Appleton family, Women in Arboriculture, PNW-ISA?
 - Barborinas: \$57,500/\$100,000, Nurseries (\$1 to TF for every tree sold?), Nursery, Landscape and Horticulture trade associations
 - Skiera: \$265,000/\$500,000, ISA, SMA, Civil Engineers, Landscape Architects

E. Develop/Implement strategic Planned Giving campaign

- Recruit and train solicitors with support from Ken Lewis
- Create marketing materials to support the campaign
- Promote to Trustees, Liaisons at annual meetings
- Identify prospects using Raisers Edge and anecdotal knowledge of our constituents
- Cultivate relationships
- Invite prospects to join Heritage Oak Society
- Encourage HOS members to invite a colleague to join
- Recognize HOS members
- Create perceived value: lapel pin, Literary Heritage tree, etc.

F. Institutionalize gratitude and stewardship

- Survey sponsors for feedback on perceived value of their investment
- Incorporate regular “impact” (non-ask) communiques into our communications calendar
- Implement Donor/Sponsor recognition protocols
 - Monthly recognition of major donors/sponsors in TF Bulletin
 - Include Major Donors poster with chapter booth supplies
- Continue Trustee thank-you calls/notes to major donors/sponsors
- Capture event volunteer/attendee contact info and cultivate these prospective donors



STRATEGIES:

- **Our Board leads by example**
 - 100% Board participation
 - Provide diverse fundraising/support opportunities for Trustees (Service Options)
 - Ask for referrals/introductions to donor prospects
 - Provide technical/logistical support for Trustees' fundraising/outreach
 - Train Board members to talk easily and eloquently about their commitment to the TF
 - Prepare 30-second personalized "elevator speech"
- **Use technology.**
 - Utilize the database to send targeted solicitations to all donors.
 - Track donor histories to identify best prospects for cultivation for:
 - Annual gifts
 - Planned giving
 - Major gifts
 - Online campaigns
 - Continue to build and reward our online giving base
 - Crowdrise.com
 - Stihltourdestrees.org
 - Engage our scholarship winners in a "pay it forward" crowdfunding campaign
 - Continue to develop our social media presence to
 - Promote our sponsors
 - Share our research results
 - Promote our events
 - Share our stories (this is especially important to STIHL)
- **Engage Liaisons, ISA Chapters, affiliate organizations and TREE Fund sponsors in fundraising for the TREE Fund**
 - Liaisons:
 - Train to talk easily and eloquently about their commitment to the TF
 - Prepare 30-second personalized "elevator speech"
 - Train in planning/execution of on-site fundraisers at Chapter conferences
 - Equip to advocate for TF at Board meetings and conferences
 - Refresh Liaison Resources toolbox to reflect Liaison needs/priorities
 - Facilitate regular sharing of TREE Fund updates w/Chapter members
 - Chapters: provide opportunities/encouragement/incentives to:
 - Share TREE Fund news with membership
 - Support TREE Fund special events with sponsors, volunteers, \$\$\$
 - Advocate for member support of TREE Fund Annual Appeal
 - Ex: RM Chapter gift match challenge for Giving Tuesday
 - Advocate for member support of Endowment campaigns
 - Ex: MAC-ISA gift match challenge for Appleton Fund
 - Affiliates: provide promotional support (and TF representation at event, where feasible)
 - SCA "Rakemaster Challenge" at ISA Conference
 - Others?



- Sponsors/Corporate supporters
 - Recruit additional exhibitor participants for TCI EXPO equipment auction fundraiser
 - Encourage corporate match of employee gifts to TREE Fund
 - Encourage/leverage corporate peers to match corporate support of the TF

- **Donor prospecting/cultivation**
 - Ask Chapters for a list of member businesses with 30+ employees
 - Target these for \$5,000 sponsorships or annual gifts
 - Position support of the TF by TCIA business owners as a commitment to supporting safety and workforce development
 - Position annual gift to support research as “maintenance expense”
 - Individuals: \$100 or more/year
 - Small tree care companies: \$5,000/year
 - Encourage Chapters to offer a CEU session devoted to Succession Planning at their conferences
 - Integrate “legacy giving” message to introduce Heritage Oak Society opportunity to these audiences
 - Cultivate multi-year Tour riders who’ve demonstrated passion for the cause (not just the ride)
 - Mine annual reports of Arboreta? (especially TMA)
 - Cultivate relationships with Land Grant Universities
 - Identify and cultivate wealthy clients of tree care companies
 - Identify and cultivate “Friends of the Foundation”
 - Explore ways to create value for this status: thank-you events?