



President/CEO Report  
To Board of Trustees  
Date Submitted: April 20, 2015

Our 13<sup>th</sup> year in operation as the TREE Fund has started off well. All 2014 Grant Agreements have been fully executed. The 2015 spring grant cycle is in process; we received 24 completed applications. Though that is a 40% decrease from last year, we received more applications in this year's spring grant cycle than we have in years previous to 2014. I attribute the decrease between this year and 2014 to the focused grant program (EAB) not being available this year. I contacted the funder of this grant program, ARBORJET. They planned to make a gift to the TREE Fund for program this year, but it is not yet received. Deb Hettinger started her management of the grant making process this first quarter. Barb continues to manage the grants made prior to 2015. Barb is supervising Deb. Hallie and I provided oversight to both on grant agreements, grant reports, grantee questions and grant applicant questions. Hallie and I granted extensions to 2 research grantees. EAB grant materials have been reviewed and payments have been made as per grant agreements.

The 2014 Audit was planned and executed. I anticipate the Temporary and Preliminary 2014 audited financial documents will be included in the 5/4/2015 board meeting packet for your review prior to the meeting. Our Auditor, Karen Olson will be attending the 5/4/2015 BOT meeting to present the audit and answer questions. The Audit Committee has reviewed the document and will make a recommendation for approval.

The March 2015 unaudited financial reports indicated that our operating revenue is at 32% of budget, and expenses are at 14% of budget. Net ordinary revenue was \$190,712 compared to \$185,797 this time last year. As of 2/28/15 the market value of our endowment was \$2,955,098.63.

Development:

STIHL Tour Des Trees: Our signature event from which approximately 70% of our revenue is generated. Managed by Mary DiCarlo [marydicarlo@treefund.org](mailto:marydicarlo@treefund.org). **NEEDS: donations and sponsorships** [www.stihltourdestrees.org](http://www.stihltourdestrees.org)

3/31/2015 YTD Tour Campaign Contributions received			
Contribution Type	2015 YTD	2014 YTD	2013YTD
Cash Donations - Restricted	\$4,120.00	\$7,039.00	\$7,560.00
Cash Donations - Unrestricted	\$14,840.00	\$21,892.00	\$9,514.47
Cash Registration	\$4,800.00	\$5,500.00	\$8,800.00
Cash Sponsorships	\$194,000.00	\$134,065.68	\$114,500.00
In Kind Donations	\$0.00	\$1,030.00	\$1,099.81
In Kind Sponsorships	\$78,371.25	\$83,251.50	\$84,981.50
<b>Total Cash</b>	<b>\$217,760.00</b>	<b>\$168,496.68</b>	<b>\$226,455.78</b>
<b>Total In Kind</b>	<b>\$78,371.25</b>	<b>\$84,281.50</b>	<b>\$86,081.31</b>
<b>Total Value</b>	<b>\$296,131.25</b>	<b>\$252,778.18</b>	<b>\$312,537.09</b>



Rider Commitments as of 4/1/2015: Full Tour: 46 / Partial Tour: 6 (5 new full-Tour riders)

YTD Comparison:

2014: 50/5

2013: 92/8

2012: 76/3

2011: 29/3 (also an October Tour)

Volunteers: **NEED: tree care and landscape firms for event support**

- Tour Planning Committee is taking an active role in recruiting new (or lapsed veteran) riders and welcoming rookies. Recruiters of a new Tour rider receive a Powered by STIHL jersey
- Our Road and Event Support team rosters are complete, with a waiting list

Education Programs: 6

- [Professor Pricklethorn](#) returns for his 5<sup>th</sup> year as official “Arborifessor” for STdT
- Book donations are planned to schools, libraries and children at events (600 of each title):
  - I Can Name 50 Trees Today (sponsored by Bartlett Tree Experts)
  - Why Would Anyone Cut a Tree Down? (sponsored by USDA Forest Svc)

Communications:

- The STdT Newsletter was given a facelift, and now includes:
  - a message from the TREE Fund
  - a message from the Tour Director
  - occasional messages from our mechanical support team
  - a profile of a rider
  - a profile of a project funded by the TREE Fund

Fundraising:

- The March newsletter focused on fundraising, with tutorials from veteran riders, Frazer Pehmoeller, Warren Hoselton and Beth Buchanan
- Donations of \$50 or more to a Tour rider during Arbor Week (April 19-25) qualify donors for a prize drawing.
- A drawing will reward riders receiving a donation during Arbor Week
- The campaign will be promoted via e-blasts, social media and TF Bulletins. Kevin Basset donated a wooden bowl for our donor prize. Riders will compete for a dinner certificate.

Safety:

Mentor program is generating very positive feedback from new riders, who receive multiple welcomes from committee members

- Rider Orientation meeting and warm-up ride are being promoted to **all** participants to give us another opportunity to promote and demonstrate safe riding practices prior to rollout

Long-range planning:

Mary met with representatives of ISA TX while at Arbor Fair in February. The Chapter requested and received a proposal with a first right of refusal for hosting the 2016 Tour (reply deadline: April 30).



Auction Campaign: *The* social event of the ISA conference which generates revenue, new donors, and donor cultivation opportunities. Managed by Karen Lindell [Klindell@treefund.org](mailto:Klindell@treefund.org)  
**Needs: sponsorships, auction items, you and your friends' attendance, giving leaders, wine and liquor for the loops and liquor game.**

Live Auction: Monday, Aug. 10 at the Gaylord Palms Resort, Kissimmee, FL

<b>3/31/2015 YTD Auction Campaign Contributions</b>			
<b>Contribution Type</b>	<b>2015 YTD</b>	<b>2014 YTD</b>	<b>2013 YTD</b>
<i>Cash Centerpiece</i>	\$0.00	\$0.00	\$0.00
<i>Cash Donations</i>	\$0.00	\$0.00	\$0.00
<i>Cash Food/Beverage</i>	\$0.00	\$0.00	\$0.00
<i>Cash Golden Ticket</i>	\$0.00	\$0.00	\$0.00
<i>Cash Heads or Tails</i>	\$0.00	\$0.00	\$0.00
<i>Cash Live Auction</i>	\$0.00	\$0.00	\$0.00
<i>Cash Mystery Box</i>	\$0.00	\$0.00	\$0.00
<i>Cash Raffle</i>	\$0.00	\$580.00	\$500.00
<i>Cash Registration</i>	\$0.00	\$0.00	\$0.00
<i>Cash Ring Toss</i>	\$0.00	\$0.00	\$0.00
<i>Cash Silent Auction</i>	\$0.00	\$0.00	\$0.00
<i>Cash Sponsorships</i>	\$6,560.00	\$3,100.00	\$8,200.00
<i>In Kind Donations</i>	\$0.00	\$0.00	\$143.50
<i>In Kind Sponsorships</i>	\$0.00	\$0.00	\$0.00
<b>Total Cash</b>	<b>\$6,560.00</b>	<b>\$3,680.00</b>	<b>\$8,700.00</b>
<b>Total In Kind</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$143.50</b>
<b>Total Value</b>	<b>\$6,560.00</b>	<b>\$3,680.00</b>	<b>\$8,843.50</b>

Auctioneer Graham Crow returns for 2015, and again brings with him the “Pick Your Paradise” bidder’s choice travel package, with vacation options in Africa, Bali and Italy. Winning bidder chooses their destination. Runners-up are offered the opportunity to match the winning bid for the destination of their choice. Multiples of each destination are available.

Additional activities/fundraisers before the live auction:

- With the support of Davey, we created a video to further inspire giving. The video shows how the work of the TREE Fund impacts everyone who studies trees, works with trees, or even has a tree on his property
- Loops ‘n Liquor (Ring Toss Game)
- “Golden Ticket”: Due to the popularity of this fundraiser, we are offering 75 tickets this year (up from 50) at \$100 each
- Researcher Reception: Guests can meet and mingle with TREE Fund researchers.
- “Super Silent” Auction: A few tables of high-end art, baskets, weekend trips, etc.
- “Table of Distinction”: This table will be auctioned off to the highest bidder before everyone is seated for the Live Auction. It will offer the best seats in the house, along with items not available to other guests, such as dessert, champagne, and small gifts



Additional fundraisers during the live auction:

- “Raise Your Hand for Research” fund-a-need campaign
- “Heads or Tails:” Guests purchase a TREE Fund bandana (\$20) to play for a chance to win a prize

Silent Auction: Sunday, August 9 – Monday, August 10 on the trade show floor

Split the Pot Raffle - Tickets are available for Liaisons and Trustees to sell at any time. however, our main selling push will be at the ISA Conference. 3 winners will split 50% of the proceeds of the ticket sales, with the other 50% for the TREE Fund.

Donations to date:

Big Game Hunt in Africa (Trophies Africa)

Custom Sawn Lumber Experience (OH)

Seattle Adventure (PNW)

In addition, we are offering a few professionally packaged vacations for purchase by Chapters who have more \$\$ than time to devote to creating a package to donate. These packages are available at cost to charity auctions, and include the Pick Your Paradise options.

Other Fundraising:

Chapters

Chapter Challenge Levels as of 3/31/2015									
Chapter	2012 Total	2013 Total	2014 Level	2014 Total	2015 YTD Total	2015 Goal	Platinum	Gold	Bronze
FL	\$16,351	\$19,885	Platinum	\$25,290	\$16,135		\$25,729	\$22,642	\$20,584
IL	\$29,152	.	Platinum	\$36,025	\$290		\$37,489	\$32,990	\$29,991
IN	\$9,836	\$17,682	Platinum	\$21,504	\$840		\$19,574	\$17,226	\$15,660
KY	\$9,090	\$2,155		\$2,471	\$250		\$8,366	\$7,362	\$6,693
MI	\$2,000	\$5,650	Platinum	\$10,162	\$0		\$4,031	\$3,548	\$3,225
MAC	\$38,325	\$58,171		\$16,260	\$1,355	\$37,534	\$46,917	\$41,287	\$37,534
MW	\$20,799	\$9,834	Platinum	\$22,402	\$800		\$24,264	\$21,352	\$19,411
MN	\$12,027	\$4,722	Platinum	\$13,865	\$2,750		\$11,525	\$10,139	\$9,220
NE	\$30,145	\$31,759	Gold	\$32,722	\$510		\$34,097	\$30,006	\$27,278
NJ	\$24,519	\$18,790		\$17,930	\$200		\$22,867	\$20,122	\$18,294
NY	\$24,355	\$59,077	Gold	\$22,555	\$5,500		\$23,743	\$20,894	\$18,994
OH	\$68,882	\$45,775	Platinum	\$72,763	\$39,520	\$62,512	\$71,036	\$62,512	\$56,829
ON	\$21,528	\$35,900		\$7,000	\$450		\$18,436	\$16,224	\$14,749
PNW	\$33,806	\$21,761		\$22,444	\$5,360		\$31,628	\$27,832	\$25,302
PD	\$32,522	\$32,788	Bronze	\$30,751	\$11,855		\$35,332	\$31,092	\$28,266
RM	\$18,627	\$18,101		\$14,140	\$125		\$20,311	\$17,874	\$16,249
SO	\$19,351	\$15,515	Platinum	\$21,028	\$1,950		\$21,850	\$19,228	\$17,480
TX	\$54,573	\$13,495		\$4,947	\$400		\$25,317	\$22,279	\$20,254
UT	\$23,260	\$17,120	Platinum	\$18,111	\$1,200		\$23,483	\$20,665	\$18,787
WE	\$93,689	\$72,144		\$46,790	\$14,030		\$74,066	\$65,178	\$59,253
WI	\$44,950	\$22,172	Platinum	\$104,717	\$4,135		\$52,384	\$46,098	\$41,907
	<b>\$627,784</b>	<b>\$522,497</b>	<b>Total</b>	<b>\$563,873</b>	<b>\$107,655</b>				



#### Endowment Campaigns:

<b>3/31 YTD Endowment Contributions</b>			
<b>Contribution Type</b>	<b>2015 YTD</b>	<b>2014 YTD</b>	<b>2013 YTD</b>
<b>Appleton</b>	<b>\$480.00</b>	<b>\$305.00</b>	<b>\$0.00</b>
<b>Barborinas</b>	<b>\$5,125.00</b>	<b>\$5,025.00</b>	<b>\$5,125.00</b>
<b>Bartlett</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Duling</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>General Endowment</b>	<b>\$0.00</b>	<b>\$25,565.68</b>	<b>\$225.00</b>
<b>Felix</b>	<b>\$1,031.00</b>	<b>\$1,341.38</b>	<b>\$1,722.57</b>
<b>Gamma</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$5,000.00</b>
<b>Illinois Arborist</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$50.00</b>
<b>McClure</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Ohio Chapter</b>	<b>\$25,000.00</b>	<b>\$25,000.00</b>	<b>\$325.00</b>
<b>Safe Arborist Techniques</b>	<b>\$0.00</b>	<b>\$150.00</b>	<b>\$13,300.00</b>
<b>Skiera</b>	<b>\$4,390.00</b>	<b>\$7,342.00</b>	<b>\$14,600.00</b>
<b>Utility Arborist Research</b>	<b>\$180.00</b>	<b>\$74.50</b>	<b>\$45,025.00</b>
<b>White</b>	<b>\$500.00</b>	<b>\$25.00</b>	<b>\$925.00</b>
<b>Wright</b>	<b>\$0.00</b>	<b>\$25.00</b>	<b>\$25.00</b>
<b>Total</b>	<b>\$36,706.00</b>	<b>\$64,853.56</b>	<b>\$86,322.57</b>

We've been given the opportunity to promote the Appleton Fund at the Women in Arboriculture breakfast at the ISA conference. Mary will represent the TF and introduce Kristina Bezanson, one of Bonnie's protégés, a Tour Rider, and researcher.

I have been working with Terrill Collier and John Hendrickson to secure a major gift from Terrill to establish the Collier Arborist Training Trust at the TREE Fund, and ultimately establish a Donor Advised Fund at CCT for the purpose supporting Arborist Training/Education programs at community colleges. Terrill expressed interest in including TF in his estate plan to build this fund. John made a "lead" gift and expressed his intent to facilitate a letter writing campaign to build this fund.

The family of Rusty Girard directed memorial gifts to the TREE Fund. None received.

#### Heritage Oak Society:

Brian Sayers article "Are You Dying?" was published in our newsletter. This article encouraged people to become members of HOS.

Amazon Smile: A portal to Amazon.com which allows shoppers to choose a charity to automatically benefit from every Amazon.com purchase. 0.5% of purchases by those choosing the TREE Fund will be automatically donated to us by Amazon. Amount raised Q4 2014: \$32.00.

#### Communications:

Communicating the impact of the TREE Fund and the difference we are making in arboriculture/urban forestry is a key focus in 2015. We initiated this strategy first quarter this year, through our new thank you notes which include impact statements. We also revamped our



thank-you process to streamline the work. **Thank you to the Trustees who continue to personally thank major donors with a phone call.**

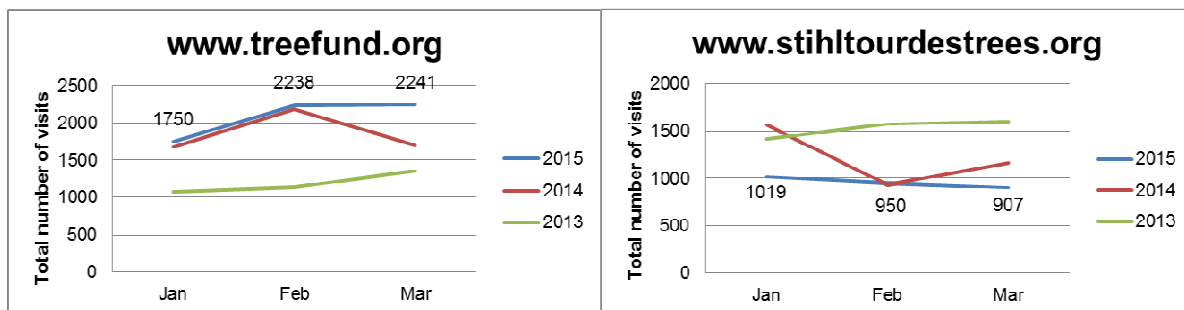
A March e-blast highlighted how Ed Gilman's research on pruning is being used by Bartlett arborist Frazer Pehmoeller in the aftermath of Super Storm Sandy. This blast was shared by STIHL media and several TREE Fund supporters. Our lead story in monthly TREE Fund Bulletins focused on research results and how they are being used in the field. Lastly, we finalized a partnership with Utah State University to produce a free webinar scheduled for April 28. It will feature TREE Fund researcher Rich Hauer's EAB management research results. Plans for additional webinars will be directed by our experience with USU.

#### Websites:

Staff worked on updating our website and researching upgrades to the site to create a responsive design that is compatible with mobile devices such as smartphones and tablets. Google's search engine algorithm will change on April 21 and prioritize websites that are compatible with mobile devices in search results. Roughly 40% of people find our two websites via search engines like Google. In Q1 2015, 18.3% of people used a mobile device to access our TREE Fund website (vs. 12.7% in Q1 2014); 24.9% used one to reach our STdT website (vs. 18.3% in Q1 2014). We are obtaining quotes from website design vendors. Completion goal: September 2015.

Visits to the TREE Fund website trended positively First Quarter. On the STdT website; however, visits are generally lower than in the two previous years. In particular, new visitors in March dropped from 60% in 2014 to 50% in 2015. This likely reflects this year's slower pace of registration. The overall drop in visitors in 2014 and 2015 relative to 2013 might be due to the harsh winters in those years. People are less inclined to think about riding the Tour (and visiting the website) when it's snowing and they aren't riding their bike.

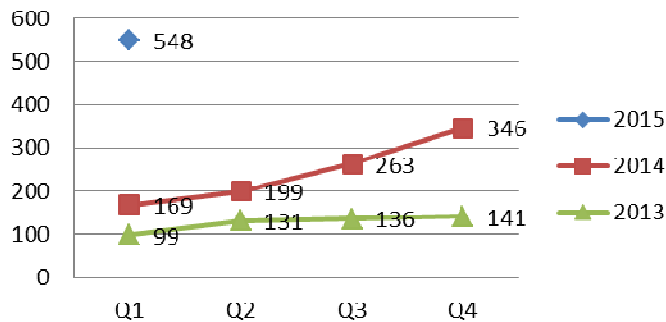
<b>Percent New Visitors to Site Q1 2015</b>			
	<b>2015</b>	<b>2014</b>	<b>2013</b>
<i>TREE Fund</i>	70.2%	67.0%	68.2%
<i>STdT</i>	51.9%	54.6%	47.2%



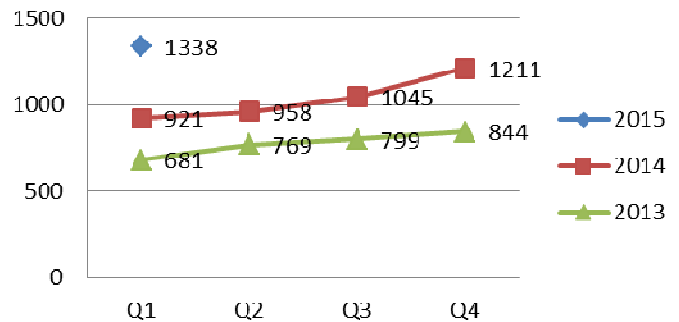




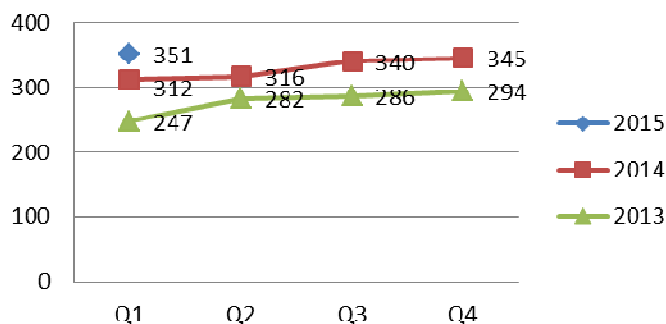
**STdT Facebook Cause Page "Likes"**



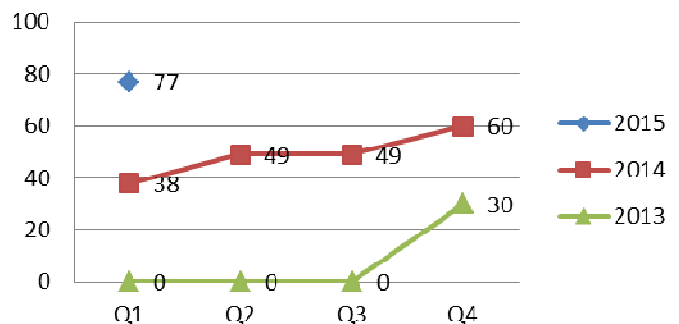
**TREE Fund Facebook Page "Likes"**



**STdT Facebook Group Members**



**LinkedIn TREE Fund Page Followers**



#### Social Media:

We saw growth on all our social media outlets

- Karen is posting on Facebook at least 3 times a week. We have established the hashtag #STIHLTdT for posts related to the Tour so they can be found on Twitter and Instagram.
- While we don't have the capacity to actively engage on Twitter, our TREE Fund Facebook feed is connected to Twitter and our audience continues to grow (currently at 1,261 followers).
- Karen posted once a week on LinkedIn on our company page. Many LinkedIn participants get TREE Fund news via Janet's page.
- We recently established an Instagram account that will primarily be used to showcase the Tour during the event. Tour photographer Jeanette Martin has volunteered to manage our Instagram account, with oversight from TREE Fund staff. So far we have 38 followers. <https://instagram.com/stihltourdestrees/>

#### Networking/Conferences:

- Mary attended IN Arborist Association's conference in January
- Janet attended TCIA's Winter Management conference in February
- Mary and Karen attended ISA's ITCC & Arbor Fair in Tampa in February
- Janet attended the ISA Southern Chapter conference in March



Industry Publications:

- Sponsorship agreements were renewed with Arborist News, TCIA Magazine, Tree Services, Arbor Age, PLANET News and Utility Arborist Newslane including publication of 3 to 10 ads per year (varies by publication) at no charge. More frequent submission of editorial content is underway.
- T & D World added a banner to their online site promoting the UARF and will include our utility sponsor/donor recognition ad in an upcoming issue.
- Arbor Age is ceasing print publication in 2015 and will publish 4 electronic flip-page editions instead, which will include our ads. To maintain their Platinum level support, they have offered to include an ad of our choice in Landscape and Irrigation magazine to replace the value lost to reduced distribution of Arbor Age.