

Fund Development Report: Second Quarter 2015

From: Mary DiCarlo, Manager, Development and Communications

To: J. Eric Smith, TREE Fund Trustees and the Development Committee

Following is an update of Fund Development activities as of 6/30/15:

2015 YTD Special Event Summaries:

6/30/2015 YTD Tour Campaign Contributions			
Contribution Type	2015 YTD	2014 YTD	2013YTD
Cash Donations - Restricted	\$18,025.00	\$26,704.00	\$21,935.00
Cash Donations - Unrestricted	\$67,724.53	\$103,273.00	\$60,344.47
Cash Registration	\$8,600.00	\$9,000.00	\$10,700.00
Cash Sponsorships	\$264,000.00	\$230,051.63	\$196,900.00
In Kind Donations	\$0.00	\$1,445.00	\$2,965.81
In Kind Sponsorships	\$95,412.25	\$106,425.50	\$99,130.00
Total Cash	\$358,349.53	\$369,028.63	\$289,879.47
Total In Kind	\$95,412.25	\$107,870.50	\$102,095.81
Total Value	\$453,761.78	\$476,899.13	\$391,975.28

Totals are year to date for the year stated.

6/30/2015 YTD Auction Campaign Contributions			
Contribution Type	2015 YTD	2014 YTD	2013 YTD
Cash Centerpiece	\$0.00	\$0.00	\$0.00
Cash Donations	\$0.00	\$0.00	\$0.00
Cash Food/Beverage	\$0.00	\$0.00	\$0.00
Cash Golden Ticket	\$0.00	\$0.00	\$0.00
Cash Heads or Tails	\$0.00	\$0.00	\$0.00
Cash Live Auction	\$0.00	\$0.00	\$0.00
Cash Mystery Box	\$0.00	\$0.00	\$0.00
Cash Raffle	\$1,480.00	\$1,460.00	\$2,000.00
Cash Registration	\$0.00	\$35.00	\$0.00
Cash Ring Toss	\$0.00	\$0.00	\$0.00
Cash Silent Auction	\$0.00	\$0.00	\$0.00
Cash Sponsorships	\$10,075.00	\$11,200.00	\$15,970.00
In Kind Donations	\$0.00	\$0.00	\$1,251.95
In Kind Sponsorships	\$0.00	\$0.00	\$0.00
Total Cash	\$11,555.00	\$12,695.00	\$17,970.00
Total In Kind	\$0.00	\$0.00	\$1,251.95
Total Value	\$11,555.00	\$12,695.00	\$19,221.95

Totals are year to date for the year stated.

Committed 2015 sponsors as of 6/30/2014
(New Sponsors) (Upgraded Support for 2015)

TREE Fund Sponsors	Level	Cash	In-Kind	Bal due (as of 6/30)
Bartlett Tree Experts	Crown	\$43,000	\$7,000	\$10,000
Davey Tree Expert Co	Crown	\$47,500		
Asplundh Tree Expert Co	Partner	\$25,000		\$10,000
Arborjet	Partner	\$25,000		
FL ISA	Partner	\$15,000	\$10,000	
ISA	Partner		\$25,000	
TCIA	Partner		\$25,000	
KASK	Partner		\$25,000	
Event Sponsors: Tour				
STIHL Inc.	Title	\$50,000	\$50,000	
Tree Services Magazine	Platinum		\$15,000	
ArborAge	Platinum		\$15,000	
Arizona Public Service	PSA Gold	\$10,000		
PacifiCorp	PSA Gold	\$10,000		
National Grid	PSA Gold	\$10,000		
Unitil	PSA Silver	\$5,000		
Bandit Industries	Silver	\$5,000		
Fairchild Botanic Garden	Silver		\$5,000	
Lentzscaping, Inc.	Silver	\$6,000		
Lewis Tree Service	Silver	\$5,000		
Morbark	Silver	\$5,000		
PLANET	Silver		\$5,000	
SavATree	Silver	\$5,000		
STIHL Southeast	Silver	\$5,000		\$5,000
Trees, Inc.	Silver	\$5,000		
Utility Arborist Assoc.	Silver		\$5,000	
West Coast Arborists	Silver		\$5,000	
Wheel & Sprocket	Silver		\$5,000	
Workshop Creative Group	Silver		\$5,000	
Arborwell	Bronze	\$2500		
Ford Motor Co	Bronze	\$2500		
Forestry Equip of VA	Bronze	\$2500		
Gamma Tree Experts	Bronze	\$2500		
Norscot Group Inc.	Bronze		\$2500	
Vermeer	Bronze	\$2500		\$2500
Wright Tree Svcs	Bronze	\$2500		
Biological Tree Svcs	Underwriter	\$1500		\$1500
Harry & Jackie Banker	Underwriter	\$1000		\$1000
Midwestern Chapter ISA	Underwriter	\$750		\$750
Event Sponsors: Auction				
New York State Arborists	Bronze/PYP	\$3500		\$1000
Gamma Tree Experts	Bronze	\$2900		\$2900
Minnesota Society of Arboriculture	Bronze	\$2500		
Jarraff	Bronze	\$2500		\$2500
Sherrill Tree	Bronze	\$2500		
Illinois Arborist Assoc	Underwriter	\$2275		\$2275
Asplundh	Underwriter	\$2000		\$2000

Event Sponsors: Auction				
Rocky Mtn ISA	PYP	\$1600		\$1600
Ohio Chapter ISA	PYP	\$1600		\$1600
Southern Chapter ISA	Underwriter	\$1500		\$1500
TREE Fund Trustees	Underwriter	\$1305		
NJ ISA	PYP	\$1000		\$1000
Penn-Del	PYP	\$1000		\$1000
Wisconsin Arborist Assoc	Sponsorship	\$700		
FL ISA	PYP	\$800		
Indiana Arborist Assoc	PYP	\$800		\$800
Tree Doctor	Cake	\$500		\$500
Arbor. Soc. of Michigan	Underwriter	\$75		\$75
Total to date		\$321,000	\$204,500	\$49,500

SPECIAL EVENTS:

2015 STIHL Tour des Trees: October 25-31
Orlando to Ft. Lauderdale, FL

Rider Commitments as of 6/30/2015:

Full Tour: 76 / Partial Tour: 10 (9 new riders)

YTD Comparison:

2014: 67/14

2013: 92/8

2012: 76/3

2011: 29/3 (also an October Tour)

Education Programs: 4

- [Professor Pricklethorn](#) returns for his 5th year as official "Arborifessor" for STdT
 - Education programs are booked at 3 schools plus city of Ft. Lauderdale.
 - Estimated total attendance (children): 400-425
 - Schools declined participation by Smokey Bear and local utilities (power line safety)
- 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)

Volunteers:

- Our Road and Event Support team rosters are complete, with a waiting list.
- Local volunteers are mostly civic groups and local organizations (not tree care)

Communications:

- The STdT newsletter is published monthly and includes a message from the TREE Fund, a message from the Tour Director, occasional messages from our mechanical support team (Silver Sponsor Wheel & Sprocket), a profile of a rider and a profile of a project funded by the TREE Fund.
- We reached out to our donor database twice in Q2 with fundraising promotions, once during Arbor Week and once during the week preceding Fathers' Day/First Day of Summer (6/21). Communications included eblasts, TREE Fund Bulletin inclusions and emails to riders.

Fundraising:

- Arbor Week Fundraising campaign brought in: \$2860 (wooden bowl offered as prize)
- Fathers' Day/Summer campaign brought in: \$34,684 (STIHL tool package offered as prize)
 - Most riders weren't in "fundraising mode" yet in April, but Day 1 of the Summer Promotion brought in \$10,000+.

Safety:

- Mentor program is generating very positive feedback from new riders, who received multiple welcomes from committee members
- A new rider meet-up (via conference call) was attended by 5 riders plus committee members. New riders expressed gratitude for the chance to get their questions answered.
- 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:

- ISA TX declined to host the 2016 Tour, citing the drain on human and financial resources caused by 3 major events in one year (ITCC/Arbor Fair, ISA Conference, STdT)
- We reached out to Western Chapter and Southern Chapter to gauge interest in hosting in 2016.
 - Western declined, citing an already-full calendar and potential conflicts with Britton fundraising.
 - Southern Chapter reviewed our proposal and voted to host an autumn Tour in 2016. Preliminary planning for the 2016 Tour is underway.

SPECIAL EVENTS:

2015 Raise Your Hand for Research Auctions: August 9-10 Orlando, FL

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

- Managed by Karen Lindell (with support from me)
- Auctioneer Graham Crow returns for 2015
 - Graham 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.
 - We sold 8 PYP packages at \$3,000 each in 2014. Average cost per package is \$1,600.
- Additional activities/fundraisers before the live auction:
 - Loops 'n Liquor (Ring Toss Game): For \$25 guests purchase the chance to toss 3 rings towards a table with wine/beer/spirits each worth \$25 or more. Any bottle(s) they ring, they win. We are seeking bottle donations from Trustees and ISA Chapters.
 - "Golden Ticket": Due to the popularity of this fundraiser, we are offering 75 tickets this year (up from 50) at \$100 each. Drawing will be held just prior to start of live auction. Winner takes home the live auction item of their choice.
 - Researcher Reception: Guests can meet and mingle with TREE Fund researchers. New this year: we are offering a chance to win 2 drink tickets to those who attend the Researcher Reception. Auction guests will receive an entry form when they check in at the registration desk. They will be instructed to drop their form in a box located in the Researcher Reception area (after talking with a researcher, of course).
 - "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, drink tickets and a small gift.
- Additional fundraisers during the live auction:
 - "Raise Your Hand for Research" fund-a-need campaign.
 - This portion of the auction was very successful last year, and we believe it continues to have growth potential.
 - With the support of Davey, as part of their Crown Partner/Media Sponsorship, 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.
 - We have confirmed several "leaders" at each giving level to start the momentum as well.
 - "Heads or Tails": Guests purchase a TREE Fund bandana (\$20) to play for a chance to win a prize. Underwritten by NYSA.

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

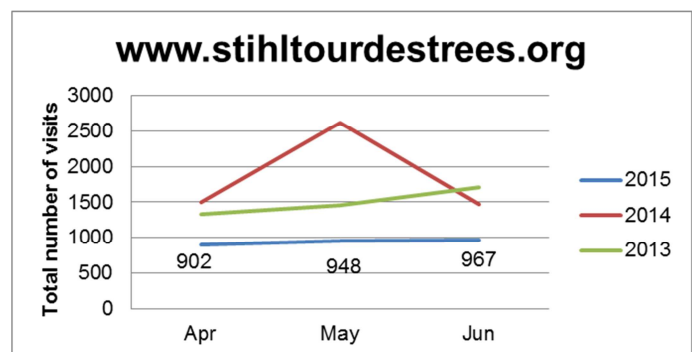
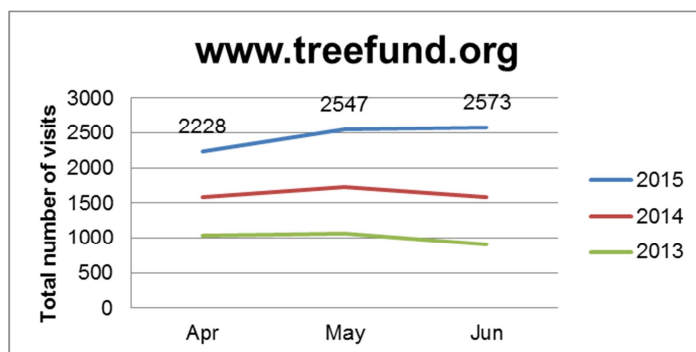
Split the Pot Raffle - Tickets are available for Liaisons and Trustees to sell at any time. However, our main selling push will be at the ISA Conference. 3 winners will split 50% of the proceeds of the ticket sales, with the other 50% for the TREE Fund.

Live Auction donations to date

- Big Game Hunt in Africa (Trophies Africa)
- Custom Sawn Lumber Experience (OH)
- Green Bay Packers pre-season tickets (Steve Asplundh)
- 2016 ISA Conference package (Wright Tree)
- Fishing package (Jim & Carmen Rogers)
- STIHL Lithium Ion Arborist package (STIHL)
- WMC 2016 package (TCIA)
- Heron statue (MAC-ISA)
- Sonoma Wine Country package (Asplundh)
- Golf/spa package (PD & NJ)
- Holland America cruise (PNW)
- Full page ad (*Landscape & Irrigation Magazine*)
- Dove hunting package (IL)
- Bourbon package (KY)
- Vermont cabin package (NE)

Website stats for Q2 2015

Visits to the TREE Fund website are trending positively. On the STdT website, visits continue to be lower than in the two previous years. This is likely due to the fact that the Tour is taking place in October (instead of July, as in the previous two years), so people have fewer reasons to go to the website at this point in the year.



Percent New Visitors to Site Q1 2015			
	2015	2014	2013
TREE Fund	73.2%	68.5%	68.0%
STdT	54.8%	62.1%	47.2%

Communication of Research Results via TREE Fund Webinar

- Webinars are the obvious next step for us to disseminate new knowledge in the fields of arboriculture and urban forestry. Our education webinar project was suggested by SO ISA Liaison Beau Brodbeck, and endorsed by Trustee/Research Committee Chair Hallie Dozier.
- Our first webinar was broadcast on April 28, 2015, in partnership with the Utah State University Forestry Extension and the Utah Division of Forestry, Fire and State Lands.
- “Emerald Cash Borer: It Will Cost You Money - Ways to Manage the Ash Cash Flow” was an hour-long webinar featuring Dr. Richard Hauer (UW-SP) discussing his research on the economics of managing EAB. This research was partially funded by a John Z. Duling grant from the TREE Fund. Board Chair Randy Miller provided a brief introduction to the TREE Fund and our mission before introducing Dr. Hauer.

- The webinar was archived on USUFE's YouTube page and can be accessed through the TREE Fund website: <https://youtu.be/rqlf-lgmLsk>.
- Results: Webinar participation was 79 people, much higher than the usual 50. The audience was a typical mix of 33.7% Arborist, 34.9% Urban/community forester, 10.8% State Agency, 1.2% Federal Agency, 4.82% Extension or Research Professional. The best indication of the success of this program was that Utah has invited us to participate again in Fall 2015.

OTHER FUNDRAISING OPPORTUNITIES:

- **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.
 - Q3 2014: \$23.00
 - Q4 2014: \$32.00
 - Q1 2015: \$24.87
 - Q2 2015: \$18.70
- **Sherrill Tree "Shop & Share" promotion:** Sherrill donated \$775 (% of Arbor Day sales).
- **Chapters**
 - Liaison vacancies: Texas. A promising conversation with ISA TX representatives in March has not yielded much in the way of measurable progress.

Chapter Challenge Levels as of June 30, 2015							
Chapter	2015 YTD Level	2015 YTD Total	2015 Goal Level	2015 Goal Total	Platinum	Gold	Bronze
Florida	Platinum	\$29,860.00	Platinum	\$25,728.75	\$25,728.75	\$22,641.85	\$20,583.50
Illinois		\$1,470.00			\$37,489.00	\$32,990.32	\$29,991.20
Indiana		\$445.00			\$19,574.48	\$17,225.54	\$15,659.58
Kentucky		\$350.00			\$8,365.80	\$7,361.90	\$6,692.64
Michigan		\$3,230.00			\$4,031.25	\$3,547.50	\$3,225.00
Mid-Atlantic		\$6,026.00	Bronze	\$37,533.92	\$46,917.40	\$41,287.32	\$37,533.92
Midwestern		\$3,769.53			\$24,263.75	\$21,352.10	\$19,411.00
Minnesota		\$2,850.00			\$11,524.58	\$10,138.62	\$9,219.66
New England		\$4,114.00			\$34,096.87	\$30,005.66	\$27,277.87
New Jersey		\$1,475.00			\$22,866.92	\$20,122.35	\$18,293.54
New York		\$7,145.00			\$23,742.71	\$20,893.59	\$18,994.17
Ohio		\$44,823.00	Gold	\$62,512.00	\$71,036.25	\$62,511.90	\$56,829.00
Ontario		\$525.00			\$18,436.46	\$16,224.09	\$14,749.17
Pacific Northwest		\$7,416.00	Bronze	\$25,302.22	\$31,627.78	\$27,832.44	\$25,302.22
Penn-Del		\$24,335.00	Gold	\$31,092.24	\$35,332.08	\$31,092.24	\$28,265.67
Rocky Mountain		\$4,200.00	Bronze	\$16,248.65	\$20,310.81	\$17,873.52	\$16,248.65
Southern		\$4,124.00			\$21,850.05	\$19,228.04	\$17,480.04
Texas		\$0.00			\$25,317.36	\$22,279.27	\$20,253.86
Utah		\$15,000.00	Platinum	\$21,337.00	\$21,337.00	\$18,777.00	\$17,070.00
Western		\$26,993.00			\$74,065.86	\$65,178.15	\$59,252.86
Wisconsin		\$17,990.00			\$52,384.16	\$46,098.06	\$41,907.33
Total		\$206,140.53					

Heritage Oak Society

This project has been put on hold pending the appointment of a new President/CEO. Brian Sayers is willing to offer his Literary Heritage Trees as an incentive to join the HOS. A Case Statement was created. Additional supporting marketing materials are needed, along with a list of prospective donors.

Impact communication - Communicating the impact of the TREE Fund on arboriculture/urban forestry is a key focus in 2015.

- Our new thank you notes include impact stories.
- 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. We plan to send out 3 impact e-blasts each year to our audiences and promote these stories in press releases, blog posts and social media.
- Our lead story in each month's TREE Fund Bulletin focuses on research results and how they are being used in the field.
- We are partnering with Utah State University to produce a free webinar on April 28 featuring TREE Fund researcher Rich Hauer's EAB management research results. Plans for additional webinars will be directed by our experience with USU.

"Institutionalizing Gratitude"

- We revamped our thank you process to streamline the work and provide more engaging notes. We now mail thank you notes rather than emailing them.
- Karen has updated our thank you notes to include more photos and more engaging content.
- Trustees continue to personally thank major donors with a phone call within 90 days

Websites

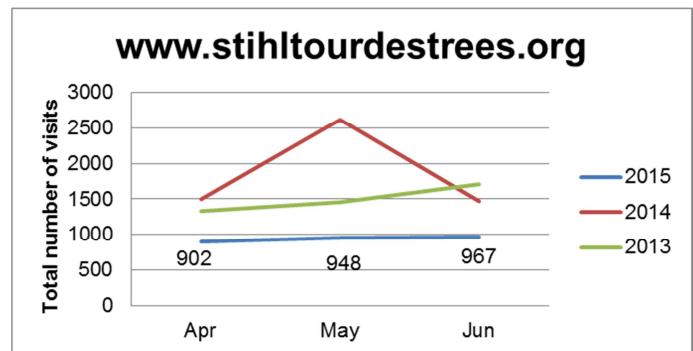
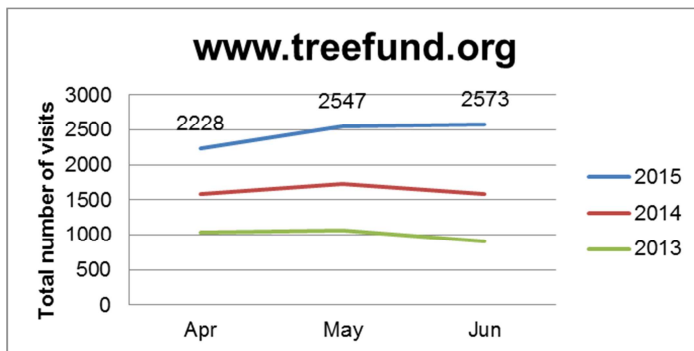
The percentage of people accessing the TREE Fund website via mobile devices is growing (10% of treefund.org traffic in Q2 2014, 15% in Q2 2015). We obtained quotes from 3 vendors for conversion of treefund.org to a responsive design compatible with mobile devices such as smartphones and tablets::

1. Allen Harris Design (current web support)
2. Hudson Fusion (Designed SavATree's website)
3. RS Consulting (recommended by Brent Gardner)

Based on cost and customer service, we awarded the project to Roger Sandoval of RS Consulting. He will begin in late August. Completion goal: September 2015.

Website stats for Q2 2015

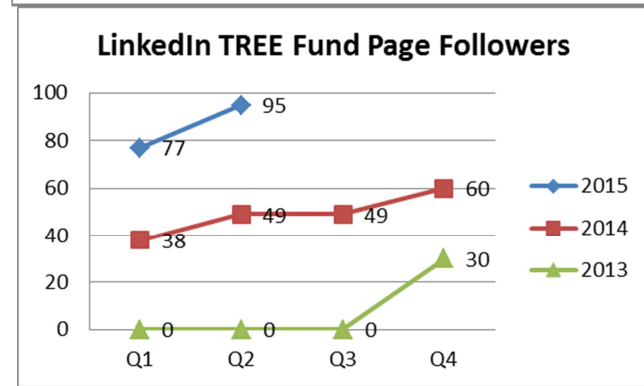
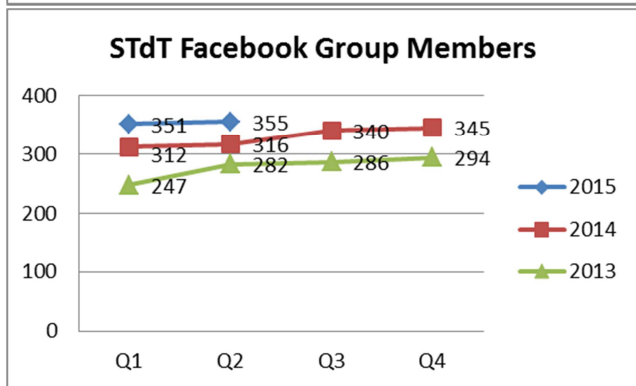
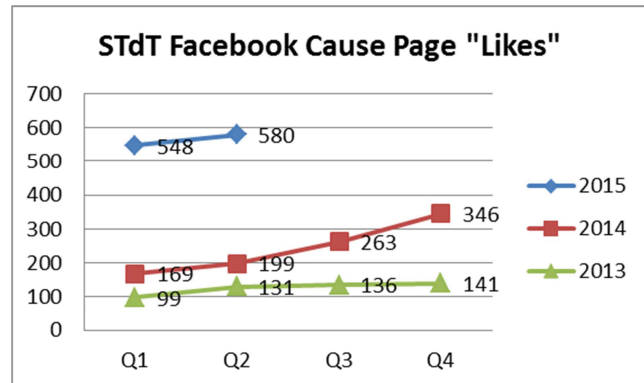
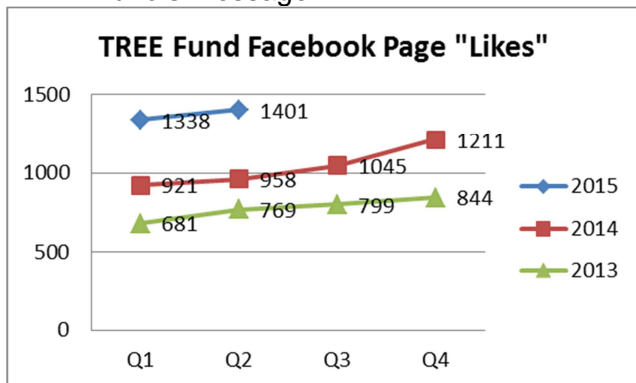
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Social Media

We are seeing growth on all our social media outlets, which gives us more ways to communicate and share the TREE Fund's message.



- 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 1,381 followers).
- Karen posts once a week on LinkedIn on our company page. Many LinkedIn participants got TREE Fund news via Janet's page. In the fall, we will run a campaign to encourage people to follow our LinkedIn company page instead.
- Our Instagram account has remained somewhat inactive throughout the second quarter; it 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. We have 70 followers so far.
<https://instagram.com/stihltourdestrees/>

Networking/Conferences:

- The staff attended an Arbor Day event supported by Bartlett Tree Experts at Elmwood School, Naperville.
 - Bartlett's Tom Tyler talked about trees and tree care
 - Janet talked about how TREE Fund supports science and research
 - Bartlett donated and installed a State Street Maple tree on the school grounds
 - Mary led the kids in "Grow, Tree, Grow" blessing
 - Bartlett contributed seedlings and goodie bag prizes for each student attending (about 150)

Industry Publications:

- Sponsorship agreements with Arborist News, TCIA Magazine, Tree Services, Arbor Age, PLANET News and Utility Arborist Newslane include 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 included our utility sponsor/donor recognition ad in their Summer 2015 issue at no cost to us (they declined to participate in a year-long media sponsorship).
- 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.

ENDOWMENT FUND CAMPAIGNS

6/30/2015 YTD Endowment Contributions			
Contribution Type	2015 YTD	2014 YTD	2013 YTD
Appleton	\$1,641.00	\$3,870.00	\$0.00
Barborinas	\$5,150.00	\$5,550.00	\$5,200.00
Bartlett	\$0.00	\$0.00	\$0.00
Collier Arborist Training Trust	\$44,365.00	\$0.00	\$0.00
Duling	\$0.00	\$0.00	\$0.00
General Endowment	\$0.00	\$25,565.68	\$695.00
Felix	\$1,207.00	\$1,341.38	\$1,917.85
Gamma	\$0.00	\$0.00	\$5,650.00
Illinois Arborist	\$0.00	\$0.00	\$50.00
McClure	\$0.00	\$0.00	\$920.00
Ohio Chapter	\$25,100.00	\$25,000.00	\$595.00
Safe Arborist Techniques	\$50.00	\$15,064.49	\$14,125.00
Skiera	\$18,145.00	\$37,357.00	\$20,525.00
Utility Arborist Research	\$710.00	\$35,328.00	\$53,624.52
White	\$650.00	\$25.00	\$1,360.00
Wright	\$0.00	\$25.00	\$375.00
Total	\$97,018.00	\$149,126.55	\$105,037.37

Totals are year to date for the year stated.

- Collier Arborist Training Trust (CATT) was created by the Collier family as a memorial to Terrill Collier. PNW Chapter and the Collier family have promoted it heavily to their audiences. John Hendricksen made a lead gift of \$5,000. The goal is \$100,000 to support education and training programs for arborists.
- Mary and Kristina Bezanson, one of Bonnie Appleton's protégés, will promote the Appleton Fund at the Women in Arboriculture breakfast at the ISA Conference.
- Will Nutter will promote the UARF at the UAA luncheon at the ISA Conference.

Respectfully submitted,
Mary DiCarlo