



**Development Committee Report**  
**Prepared by: Brian Sayers, Chair**  
**Date Submitted: 11/17/15**

**The Development Committee is charged with the following:**

**Basic Function:** Responsible for the leadership and oversight of fund development activities and external communications of the organization

**Responsibilities:**

- Oversees the creation and execution of the TREE Fund's development plan to effectively promote the organization, raise awareness about our mission, expand the donor base, develop new funding sources and coordinate planning giving materials.
- Reviews quarterly reports on fund development activities.
- Reviews quarterly reports on communications activities.
- Reviews and recommends budget line items, revenue and expenses for fund development and communication activities.
- Reviews annually basis the revenue sources for the organization in conjunction with the Finance Committee

**Related Strategic Initiatives:**

- To increase awareness and understanding of the TREE Fund's mission by existing and emerging constituencies
- To increase awareness of our programs
- To increase financial support of programs
- To increase unrestricted gifts in number and amount
- To diversify operating income

**Projected Outcomes:**

- Increased awareness of TREE Fund
- Diversified revenue streams to support the growth of our operations and endowment

## Meetings:

- E-mail agenda discussion 11/5/15 to 11/16/15. (Eric Smith, Will Nutter, Sara Sankowich, Brian Sayers, Randy Miller, Mary DiCarlo)
- Topics: HOS brochure, timeline, fundraising ideas, Tour report

## Accomplishments:

1. Approved Gift Acceptance Policy
2. Reviewed and accepted Grant Retention Policy
3. Developed rough draft of “compelling case” brochure” as below:

### COMPELLING CASE BROCHURE (tentative and rough – needs graphics)

Breathe in; breathe out! Now, do it again! You took this for granted didn't you? Yet, it is anything but guaranteed. This little breathing workout is made possible for you by TREES!

The role of trees and forests for our breathing is absolutely critical. Forests renew our air supply by absorbing carbon dioxide and producing oxygen. Trees also clean our atmosphere by intercepting airborne particles, and by absorbing ground-level ozone, carbon monoxide, sulfur dioxide, and other greenhouse gases. A single tree can absorb 10 pounds of air pollutants a year, and produce nearly 260 pounds of oxygen- enough to support two people.

Yet, we have not been kind to these benefactors. Our trees are hurting these days. They need friends. We owe them our help.

This year alone each of us will owe 8,409,000 breaths to trees.

So when you become aware of your breathing, remember two things: (a) you owe each of these breaths to trees, and (b) before your LAST breath, you can return the favor.

It is easy to do. Join the Heritage Oak Society. One way to accomplish this is to designate 5% of your estate to the TREE Fund. You do not have to decide any fixed amount – just 5%. You won't miss it while you are alive and once you are dead you won't miss it then either. Furthermore, for everyone who joins the Heritage Oak Society we will send you a three year old white pine seedling taken from the workaday homes of Henry David Thoreau, Ralph Waldo Emerson, Robert Frost or Herman Melville – your choice! A double legacy!

n.b. It may be possible to insert somewhere in this brochure a number of bullet points about the benefits of trees. [clean air, jobs, clean water, carbon sequestration, reduced crime, increased property values, mental health, temperature control, flood control, wildlife habitat, etc. etc.]

4. Approved timeline for HOS as proposed by Eric Smith below:

"I have a letter with a survey ready to go out the door to all current members requesting information we need to properly document anticipated planned gifts for the record, since things are a little inconsistent on that front at this point. As part of my six-month CEO eval, goal is to have all of these documented, and to develop the plan you note below to increase HOS involvement as part of a comprehensive capital campaign designed to grow the endowment in the years ahead. I plan to collect all of the current information by year's end, then develop the plan for growth in early 2016, if that is not inconsistent with goals/timelines set before I was here. If it is, I can tweak that timeline, just let me know!"  
(J. Eric Smith)

5. Received Overview Report from Mary DiCarlo as follows:

**Fund Development Overview: October 31, 2015**

**STIHL Tour des Trees** (October 25-31, Orlando to Fort Lauderdale, FL):

- Rider fundraising: \$314,136 (up from 2014 TOTAL fundraising of \$312,492)
- Sponsorships: \$283,700 (down from 2014 total of \$307,293) (no significant sponsorships remain unpaid for 2015)
- 4 Professor Pricklethorn (PEP) education events attended by approximately 430 children
- 600 copies of *I Can Name 50 Trees Today!* and *Why Would Anyone Cut A Tree Down?* distributed to children attending events during the Tour and to libraries in proximity to the 2016 Tour route. Each book contained a bookplate crediting the TREE Fund, the Tour and Bartlett Tree Experts.
- 12 new trees planted and dedicated during Tour events (including remembrance events for John White and Terrill Collier)
- 10 events which were supported by community volunteers and attended by civic leaders
- 3 National Park visits and 1 State Park visit featuring education/enrichment opportunities for participants
- 2 dinner programs offering educational enrichment for Tour participants
- Media coverage: 44 placements, including New York Times, Orlando Sentinel, Huffington Post and local media in Florida and Tour participants' hometowns (including Germany). Impressions: 182,671,971

Highlights: outreach events showcased the Tour and the TREE Fund to new audiences. Professor Pricklethorn events were consistently high quality and reached attentive

audiences. Fort Lauderdale finish integrated with a citywide event which attracted families with Halloween fun and a tree giveaway. Fort Lauderdale event also offered productive public engagement opportunities for our sponsors.

**Raise Your Hand for Research Auctions** (August 9-10, Orlando, FL):

- Revenue: \$92,320 (19% short of goal, \$14% less than 2014 revenues)
- Highlights:
  - Raise Your Hand for Research cash call: \$14,350
  - Golden Ticket sales: \$6,500
  - Strong volunteer support from Trustees and Liaisons
  - Strong catalog support from Chapters
- Obstacles:
  - Attendance at 2015 ISA conference was 15% lower than 2014
  - An abundant catalog created a buyers' market, yielding lower bids even on reliable revenue-generators
  - Orlando attractions competed (successfully) for our attendees' vacation purchase dollars
  - High-priced luxury hotel venue inflated our costs on every front
- Recommendation: Retool this fundraiser to be more inclusive of the host chapter and the conference attendees. Abandon the labor-intensive silent auction, keep the proven money-makers.

**Chapter Support:**

- Our Liaison roster is full for the first time, though we continue to see turnover in the Liaison ranks.
- Chapter support was down \$129,598 for YTD October 1 compared to 2014 (Chapter Challenge reports are generated quarterly), but our autumn Tour generated another \$95,000 in October 2015 (which will show in Q4).
- Wisconsin's powerful fundraising engine raised \$104,656 in 2014, mostly in support of the Bob Skiera Fund. That effort was not sustainable, and no one else stepped up to match it in 2015.

**Endowment:**

- Endowment contributions are significantly lower vs 2014, as Wisconsin Arborist Association and UAA have softened their focus on fundraising for the Skiera and UARF campaigns, respectively.

**Conferences:**

- Mary, Karen, Barb, Deb and Carol attended the ISA Conference and Trade Show in Orlando to staff our booth and events there.

- Eric and Mary attended the ISA TX conference in Waco to continue bridge-building begun in Orlando. Those efforts are bearing fruit—a new Liaison and support for collaboration from ISAT.

#### **Websites:**

- Treefund.org is being upgraded with better security features in 2015. Integration of responsive (mobile-friendly) design for the site will require a comprehensive overhaul (targeted for 2016).

Treefund.org continues to draw more new visitors than stihltourdestrees.org.

#### **Social media:**

- We maintain an active presence on Facebook and LinkedIn, and continue to attract new followers on both. Our Instagram account was bolstered by rider posts during the Tour (aided by active coaching by Jeanette Martin, our photographer). Our audiences remain largely indifferent to social media, but we're seeing progress.

#### **Development Committee Objectives for the next 3 months:**

1. Incorporate some “hard” compulsion material into compelling case material as suggested below:

What I believe is missing from the entire TREE Fund discussion is the actual benefit being realized by the research that our grants are funding. Without this, our message is a “touchy feely” one that, in my opinion, is not compelling by itself. People want to know that their money is making a difference. Also, when we say “trees are hurting” it seems to be in contradiction to the research that says there is a greater canopy than ever. We need to identify specifically how and where.

Is there a specific monetary target in mind? (XXX\$ raised in XXX years?) when a campaign of this sort is announced it can grab attention both in the media and with the public. We could be targeting a major event (Tour DC in 2017?) to announce something like this. (Roger Phelps)

My experience with planned giving programs like Heritage Oak Society is that they do require more detailed support than annual gifts or sponsorships made from current income. A quick teaser may pique people's curiosity, but few people will incur an obligation from their estate without a more in-depth cultivation, usually involving a personal request from a trusted individual. Planned gift cultivation also usually includes explanations of benefits to the estate, especially if we are able to move beyond simple bequest or insurance gifts into more complex trust or annuity based gifts. So I think a two-fold approach will be

essential: a simple brochure style teaser to make people aware of the existence and benefits of HOS, backed by a more robust case statement that prospective donors can use with family members and financial/legal advisors as they actually craft their gifts. My deepest experience with planned giving is through American Institute for Economic Research. Here's the AIER planned giving page for perspective on how we market such programs: [www.aier.org/planned-giving](http://www.aier.org/planned-giving) . . . it provides a good mix of organizational need statements, plus benefits to donors. (Eric Smith)

Some responses to Phelps and Smith points about “hard” info for HOS ask as below:

Most interesting! As usual, things are more complex and complicated than I want them to be. I wonder, though, how many prospective donors feel the same way.

I think that I have had in my mind an attempt to “touch” those prospective donors who do not need much persuasion. With those folk I have been thinking that we should keep it very, very simple.

Hence, my predilection for offering one avenue only: designate 5% of your estate to go to the TREE Fund. Nothing else to do, no other paperwork, Don't give it another thought. Just do it. You would have to be miserly not to. You won't miss the money, etc. etc.

I think both of you (Eric and Roger) have a more far-reaching intent than do I SO FAR. I am definitely open to your greater experience in all of this, but am still wondering whether or not a genuinely “dumbed down” ASK has its benefits.

Is there a dual stream approach occurring here, or is it the case that your more expansive (more detailed, more inclusive, more complicated) approach is such that my simpler one would be embedded in it?

Would my dumbed down version do any harm? If feasible at all would it require a carefully selected audience so that those who do need more financial and legal information would not receive it? Is that division even possible for us to know?

2. Actually publish “compelling case” brochure along with additional information about actual beneficial results, etc.
3. Target specific names (a) from board members, and (b) outside green industry. Distribute questionnaire at December board meeting.
4. Disseminate feature length article for HOS
5. Enroll 6 new HOS members

**Next Meeting Date: To be determined**