



**Development Committee Report**  
**Prepared by: Paul Fletcher, Chair**  
**Date Submitted: May 4, 2018**

Meetings:

**January 17, 2018**

Attending: P. Fletcher, W. Nutter, J.E. Smith, M. Otting

**Topics:**

1. As of this meeting, the year-end financials were not complete. The forecast for year-end income was \$1.3-million and net income forecast was \$31,500. Year-end appeal landed at \$30,000 for operations-Notes from Trustees were very effective. Some 2018 partnerships received at end of 2017. Focus in 2018 is philanthropic giving.
2. Tour related Development Systems: To the credit of staff, Everyday Hero replaced Crowdrise as the vehicle for donating to riders online, linking with the new database systems e-Tapestry and QuickBooks. A Virtual Tour option is now available to individuals willing to raise money while doing the miles in a different fashion.

Discussed the time commitment and investment required to run the Tour, as well as the potential for mishaps that could be very costly. President, J. Eric Smith will analyze options for the future and submit recommendations in May.

TREE Fund After Hours-August 7 at ISA host hotel, Hilton, Columbus. Ideas were discussed. Nothing finalized. Discussed presenting appreciation awards to top tier donors.

3. Tree and Soil Research Fund off to a great start; \$14,000 in contributions- 90% of donations from new donors. Goal: \$500k by 2019.
4. 2018 Endowment Priorities: Completion of fundraising for Tree and Soil Research Fund, White Fund, Hall Fund and Skiera Fund. Wright Fund will be a priority in 2019.

## **March 13, 2018**

Attending: P. Fletcher, W. Nutter, J.E. Smith, M. Otting, Jeff Wilson, Ken Ottman, Guest-Jacques Brunswick

### **Topics:**

1. Strategic Plan March deliverable-Engage digital marketing partners. Partner identified-proposal pending.  
  
J. Eric Smith spoke of the annual report, which was to be complete by March 31. The report has since been distributed to high-level donors and put up on the website in the Liaison toolbox.
2. Monika Otting asked committee members if they would be comfortable calling any of the corporate partners that had donated in the past but are not committed yet this year. As always, Will Nutter stepped up to accept several calling assignments. Eric Smith stated plans to contact Mike Neal at the Minnesota Shade Tree Short Course regarding Mowbray's partnership. Staff to call and follow up with remaining partners.
3. TREE Fund After Hours/Auction planned in coordination with Ohio Chapter party. Location will be an offsite venue. Discussed auction items. Will Nutter won and went on the Guatemala trip from last year's auction. Raved about the experience. Also looking for smaller items that would generate a different level of participation. Arborwear donating item. Climbing gear donation suggested.
4. 2018 Tour Update: Committee members were asked to encourage riders to register. Peter Sortwell registered as a new rider and has brought in new TREE Fund donors outside of the industry. Karen Lindell is working with the Tour Planning Committee to schedule community engagement events and education events with Professor Pricklethorn along with tree plantings and dedications. Stops include Davey tour, Weaver Leather tour, Arborwear tour and a liberty tree planting at Ohio State House. Committee Chair Fletcher offered to rent a car to provide shuttle service for Professor Pricklethorn and/or the photographer.
5. Endowment Priorities Update: Focus is on getting the following funds to reach their goals: White Fund (appeal letter later in year), Hall Fund (April appeal letter), Skiera Fund (April appeal letter), Tree and Soil Research Fund (Trustee Jim Urban continues to raise funding).
6. President and CEO Smith noted that an evaluation of the Tour after 2018 is a Strategic Plan deliverable due to the Executive Committee on April 11. Mr. Smith will send the evaluation to committee for feedback in April. Trustees will review it at May 21 board meeting.

## Accomplishments:

Thanks to the leadership of President and CEO, Eric Smith, TREE Fund has made great strides in development. His unwavering commitment to steer and guide the organization in a positive direction has caused those who might have been skeptical to take notice. Attached, as an addendum to this report, is one example that shows the ease of our jobs when attempting to reconnect old and connect new partners to TREE Fund.



JES Memo re  
Meetings at Bartlett

## Objectives for the next 3 months:

Encourage financial support of Tour riders  
Promote Tour and After Hours events

Next Meeting Date: May 8, 2018