



**Development Committee Report**  
**Prepared by: Paul Fletcher, Chair**  
**Date Submitted: September 14, 2018**

Meetings:

**Date & time of meeting:** May 8, 2018 Noon Central Time via conference call

**Attending:** Paul Fletcher, Chair; Jacques Brunswick; Randall Miller; Will Nutter; Jeff Wilson; J. Eric Smith; Monika Otting

**Absent:** Brian Borkowicz; Ken Ottman

Development Committee Chair Fletcher opened the meeting at 12:03pm Central Time.

1. March 13 Meeting Minutes: Committee Chair Fletcher asked for comments or edits to the minutes; none were offered. Motion was made by Mr. Miller to accept the minutes; seconded by Mr. Wilson. Minutes were accepted as submitted.
2. Strategic Plan Implementation/May Goals: President and CEO Smith's review of the Tour will be addressed and voted upon at the Trustee Meeting on May 21. Mr. Wilson suggested getting company matches for young virtual Tour participants next year.
3. 2018 Tour Update: There are currently 61 registered riders and 4 virtual participants; same as at this point last year. Fundraising is up from this time last year.
4. After Hours Update: TREE Fund is partnering with Ohio Chapter and holding the After Hours event in conjunction with their party offsite at Park Street Cantina, near the convention center. This will allow us to benefit from a generous cost savings and hopefully increase attendance. Private donor appreciation reception will begin at 5:30 and After Hours held from 6pm – 7pm. Event will include a live auction, golden tickets, drink tickets, taco bar, and a band. Committee Chair Fletcher stated that Jim Ingram at Bartlett offered to donate a Rhode Island mansion stay package. Auction items will vary in price range.
5. Corporate Partners: Mr. Nutter continues to follow up with Lewis Tree, Duke Energy and Southco. He noted that Nelson Tree Service is under the Asplundh umbrella. Mr. Miller is working with Pacificorp's new management; he will call Mike Neal at Mowbray's and contact PNW Chapter. Ms. Otting stated that Dominion and Gamma Tree are not

renewing their partnerships this year. Western Chapter will be confirmed shortly. Committee Chair Fletcher continues to try to reach National Grid.

6. Partner Prospect List: Ms. Otting will add contact information to the list for committee review and contacts. Committee members were asked to send new prospects to Ms. Otting. Ms. Otting will send a corporate partner package to Mr. Brunswick. President and CEO Smith noted that an October Strategic Plan deliverable is to update the Prospect List.

**Date & time of meeting:** July 10, 2018 Noon Central Time via conference call

**Attending:** Paul Fletcher, Chair; Jeff Wilson; J. Eric Smith

**Absent:** Jacques Brunswick, Randall Miller, Will Nutter, Ken Ottman, Monika Otting

Development Committee Chair Fletcher opened the meeting at 12:05pm Central Time.

1. 2018 Tour Update: There are ~75 registered participants, including virtual participants. Peter Sortwell, our highest fundraiser, had to drop out of the Tour due to a non-cycling accident. Chapter contributions are due July 17 and Team kitties will be split July 19. Rider fundraising is due July 23. We continue fundraising toward the public goal of \$325,000 until October 31, so funds can still come in after the Tour. Expenses should be down from last year due to lower hotel and food costs. Solicitations for 2019 Partnerships will begin in October. As a Strategic Plan deliverable, President and CEO Smith submitted a three-year Tour evaluation, which the Board of Trustees approved. It recommended an autumn Tour over 400-500 miles beginning with dinner Sunday night and ending with the finale dinner on Friday. Potential locations for future Tours: 2019 Kentucky/Tennessee split, 2020 Rocky Mountain Chapter in Denver area, 2021 Austin, TX or Arbor Day Lied Lodge to Ames, Iowa. Tour Director, Paul Wood will be seeking participants outside of the arboriculture field. Virtual participation will be emphasized more in 2019.
2. ISA Conference / After Hours Update: President and CEO Smith will speak after ISA E.D. Caitlyn Pollihan at the ISA Conference welcome reception. TREE Fund booth will have an interactive component, similar to last year. After Hours event will be held in conjunction with Ohio Chapter party offsite at Park Street Cantina, near the convention center. This will allow us to benefit from a generous cost savings and hopefully increase attendance. Event will include a live auction. Golden tickets will be offered again where state regulations allow.
3. Skiera Fund: Fund has reached its goal. Wisconsin Arborist Association will match up to \$10,000 in gifts made before end of July. President Smith is asking ISA E.D. Pollihan to shift its annual endowment gift from Skiera Fund to Tree and Soil Research Fund in 2018-2019; this requires ISA Board approval.
4. Corporate Partners, Prospects: Per Strategic Plan deliverable for October, Committee is asked to propose new Partnership prospects and submit contact information.

5. Tree and Soil Research Fund: Trustee Urban has been spearheading this campaign and is cultivating approximately a dozen national landscape architects via work on a feasibility and messaging committee. He had expected this campaign to take two years; it is likely to take longer based on first six month returns.

Meeting adjourned at 12:40pm Central Time. Monika Otting will follow up with a summary memo to the Committee on open questions from this meeting. Next meeting is scheduled September 11 at noon Central Time.

**Date & time of meeting:** September 11, 2018 Noon Central Time via conference call

**Attending:** Jacques Brunswick, Randall Miller, J. Eric Smith, Monika Otting

**Absent:** Paul Fletcher, Chair; Will Nutter, Ken Ottman, Jeff Wilson

Meeting opened at 12:06pm Central Time

1. May 8 and July 10 Meeting Minutes: Vote to approve the minutes was tabled until next meeting due to lack of a quorum.
2. 2018 Tour and After Hours Review: Tour riders and teams raised ~\$340,000, with three weeks left to go before we close this year's campaign. Expenses will be down from last year due to lower hotel and food costs. Davey media coverage for the Tour was strong via both social media and print media. Solicitations for 2019 Partnerships will begin in October. ISA Trade Show booth was successful with excellent location and ~100 participants adding their votes to the Future of Arboriculture board. After Hours event had ~550 attendees at joint event with Ohio Chapter party. Reviewing alternative options than auction for 2019 as it does not work well as part of a "friend-raising" event anymore.
3. Year-End Appeal: Corporate appeals will go out early October. Annual Appeal will feature Dr. Brian Kane. Approximately 5,000 letters will go out mid-October. Nursery appeal will also be sent.
4. Corporate Partners and Prospects: President and CEO Smith emphasized the crucial need for new prospects/contacts and increasing current prospect capacities.
5. Tree and Soil Research Fund Committee: Committee includes ten national landscape architects led by Paul Josey on Jim Urban's behalf to develop a message strategy and network of prospects. Eric will attend the national ASLA meeting in October.

6. 2019 Calendar of Events: Calendar will include After Hours event, Tour des Trees, Asplundh Golf outing, Ohio Chapter picnic, ISA Chapter conferences and fundraisers and appeal schedule deadlines. Committee was asked to forward other events to Monika.

Meeting adjourned at 12:35pm Central Time. Next meeting is scheduled October 4 at 11 am Central Time with the Communications and Liaisons Committees.

Objectives for the next 3 months:

Explore new Partnership prospects

Promote year-end giving campaign

Next Meeting Date: October 4, 2018.