

## **Development Committee Meeting Minutes**

**2/10/21 - 3:30-5:30 pm via Zoom**

Attendance: Denise Soderholm, Diane Harding, Gordon Aoyagi, Jackie Wah, Jennie Peterson, Joan Gossett, Jonathan Sudler, Kathy Whitmire, Paula Ress, Scott Wilson, Winston Welch

If we include a video link in an email blast it should be a link in the email, not a video embedded in the message.

Year-End Appeal Results: mailing was sent to 800 addresses, households were combined into one letter. Expenses for mailing \$404. We received 114 donations totaling \$23,035. Went over our goal of \$23,000, appeal was a success. Total includes corporate donations and board donations. In accounting, these two donation categories will be separated out but for year-end appeal total they are included. The donation number will increase as we continue to receive donations using the year-end donation form. Also received 4 branch donations for \$450 (not included in total).

Seven people responded to making donation on a regular basis. One couple used credit card which will charge it automatically next year. The other six paid via check so they will be reminded next year. Prior to this we had people donating monthly, one to LKOC, one to TOC. Most donations come in by check.

We received Phase 2 PPP loan \$27,000 (which will turn into a grant as we will spend it in time).

Melanie Kosaka PR outreach. See "TOC PR Objectives" on TOC website. Listed are objectives and suggested actions steps.

TOC does not have a press kit. Melanie will work on that so TOC has a prepared press packet ready to go. When LKOC does something they send out press release to local media who cover Kailua.

Branches should send info about upcoming events to TOC so we can coordinate with Melanie and she can weave them into our story. Send schedule items, events, newsletters to Winston so they can be forwarded to Melanie.

How will branches fit into this new branding with TOC?

Are we consolidating branch and TOC events to publicize as one organization?

Would be wise to work on TOC and branches together as a multi-faceted organization.

Should we rename branches to be clearer that they are a part of TOC? Instead of Lani-Kailua Outdoor Circle, should we rename to The Outdoor Circle, Lani-Kailua Branch. Would create an affinity not only to the branch but to TOC as a whole. It would make PR outreach benefit branches more because branding would be cohesive. There will be a lot of resistance from the branches about this change. Would need to be discussed at Full Circle Meeting so branches could give input. In 2015, Marti set branches up with official name: Lani-Kailua Branch of The Outdoor Circle. Maybe externally and for PR we call branches: The Outdoor Circle, Lani-Kailua Branch but internally they are still Lani-Kailua Outdoor Circle.

Create graphic image of TOC logo that includes names of branches in the tree showing us as single organization.

For a unified PR branding campaign, need to change management strategy with branches first before we begin rebranding. First step is to present rebranding proposal to branches and explain the strategy to centralize outreach and press relations and let branches know the benefits to them like greater media penetration and ask for their input. To allow larger outreach and move into more digital communications, need a strong brand and a centralization of our image to implement this strategy. More publicity for TOC has ability to add more members to branches so they will benefit in that way as well.

Branches could still send out their own PR as long as its coordinated and label everything in a consistent manner, it brings more awareness statewide to TOC and the branches.

Branches need to acknowledge TOC has accomplished a lot statewide and for their branches. Us versus them is not healthy. Cohesive branding is way to eliminate that tension.

Build on both strengths of branches and branding of branches – should be woven into narrative of TOC. Ask Melanie to craft a strategy to present the trunk (TOC) and its branches and honor contributions of both.

1. Ask Melanie for additional feedback on how to include branches in PR strategy.
2. Consider the items we want Melanie to promote (events, projects, etc.) and make sure they include branch projects. Develop a calendar and content for the media and ask branches to contribute.

Get Melanie to contact branches to find out about who they are, who do they want to join their branch, etc. This should be presented to TOC board before having her reach out to branches.

Melanie is open to feedback. Board questions were sent to board members – those who responded were helpful.

Planned giving flyer. Should say contact your estate planner, etc. and our EIN number. People give to people, keep TOC as the contact person.

What is our first step? Do a targeted mailing? Who to send to and how are we going to respond if someone responds? And if someone calls, are we prepared on what we need to say to them? Need to be prepared before that happens. Implementation is key.

Finance Committee meeting coming up. That group could hash through some of these issues and how to proceed and report back to the board.

If someone called would field call to Kathy. She needs information so she is prepared on how to respond. Winston will get information from Hawaii Community Foundation (HCF) on this.

Reminder – send separate targeted letter & planned giving flyer to estate / financial planners as well. Ask Melanie to do a targeted campaign to estate planning attorneys, etc.

HCF is vehicle for complex gifts. Large organizations run it through their national organizations. We don't have that luxury so maybe make a smaller group using materials we have on TOC website already.

Get input about what is special about TOC. What is the message that would resonate with you? Our planned giving information based on HCF program we were a part of (Giving Beyond Your Years). They have stopped the program but we can still use the materials.

Salvation Army places ads in newspaper about estate planning seminars. No solicitations are made. Lawyer does the presentation. Start a constant message that goes out. Should we consider present webinar without obligation with disclaimer?

Social media – linking TOC with branch FB pages. Want to defer to Melanie on that. Current Facebook accounts: = TOC, Next Generation, Waikiki, Lani-Kailua, North Shore, Waimea, East Hawaii, Manoa. Current Instagram: TOC, Lani-Kailua.

Honolulu Magazine cover article (Feb. 2021) disappearing trees of Honolulu offered general indictment of city which may help us with the new administration. In Honolulu Magazine December 2020 issue article on Exceptional Trees, TOC was mentioned.

Put on future agenda – sustaining member category where members commit to monthly or quarterly contribution set-up automatic credit card payments. Could be a membership category or donation.

General membership questionnaire – send to membership about TOC. Are we still doing that? Melanie feels TOC should generate questions germane to us. Find out what general members think of TOC (not board members). Is that a function of development committee? Or branch committee?

This is questionnaire that goes out to every member. Committee should come with questions first, run them by Melanie, then put them into survey monkey. Volunteers: Joan, Kathy, Diane, Winston.

Superbowl ad for Turbo Tax where it mentions, "In Hawaii there's a credit for maintaining an Exceptional Tree." Will mention the ad in the Greenleaf. Maybe we should ask Intuit and Turbo Tax for a donation. Maybe a donation to Arbor Day Foundation for TOC?

Next Meeting: Wed. April 14, 2021 @ 3:30 pm

Submitted by Jackie Wah