

## **Development Committee Meeting Minutes**

**8/11/21 - 3:30-5:30 pm via Zoom**

Attendance: Gordon Aoyagi, Mimi Bornhorst Gaddis, Joan Gossett, Diane Harding, Winston Welch, Kathy Whitmire, Jackie Wah, Scott Wilson

Minutes of June 9, 2021 meeting approved.

### **Membership Survey**

Good response rate. No duplicates between email and paper.

1<sup>st</sup> email: 555 sent out. 134 responses. 56% people opened email. 26% clicked through to survey.

2<sup>nd</sup> email: 237 sent out. 38% people opened email. 14% clicked through to survey.

Hardcopy: 164 sent out. Received 36 responses so far.

Denise & Joan volunteered to help tabulate survey responses. Members interested in survey, asked if results will be published. Maybe in narrative form? Would be good Greenleaf article.

### **Greenleaf**

Will be emailed thorough Network for Good. Can see who clicked on what article, see where interests lie. Melanie Kosaka giving structure and clarity to Greenleaf using suggestions from last Development Committee meeting.

Will include these general areas: note from Winston or Scott, TOC history, Nature Center history, Remember When, How to Gardening – with Diana Duff, tree or flower of month - something blooming during time it goes out, ways to give (with member and board member profiles), calendar activities and branch highlights. Not all branches will have something every month. Will need a lot of content. Get things lined up in advance. Email will have headline with photo, very digestible, links to full story on TOC website.

Need estimated costs for hardcopy mailing to put into budget. Discussed everyone getting hard copy once a year. For now, send only to those with no email (about third of our mailing list) to cut down on costs. Also send to donors who may not be members.

Need to coordinate between monthly email Greenleaf and bi-annual or quarterly hard copy. Get first Greenleaf out by email. Worry about hard copy later.

Member Survey – 79% said they prefer email. 1/3 like newsletter. 1/3 like branch newsletter. 1/3 like TOC website. 18% like branch website. 15% branch or TOC Facebook. Telephone calls 4%. Respondent could choose more than one response. 53% want to hear from TOC or branch monthly. 32% quarter. 8% Semi-annually. 13% weekly via social media.

### **Waikiki Branch**

Lucia Kye interested in reviving Waikiki Branch, become Branch President, expand territory, rename it South Shore Branch (good symmetry with North Shore Branch). Encompass area from airport to Hawaii Kai or all the way to Makapuu. Need to discuss with Susan Spangler, East Honolulu Branch President, get her approval of consolidation before moving ahead.

Lucia wants to interview branch leaders. Put together documentary highlighting branch leaders and members, why that branch is important. Why branch leader got involved and importance of the branch in their area. Diane will contact branch leaders, let them know Lucia will be contacting them. Do interviews on Zoom that can be posted and cross posted on Instagram, Facebook, and TOC website. Could do a monthly feature on branch leaders in Greenleaf as info becomes available.

Branch leaders do not have many opportunities to come together. Maybe set-up a Zoom meeting with all branch leaders.

### **Ballot Mailing**

Sent out 501 ballots, received 142 responses. Still have until August 28<sup>th</sup> but have enough votes so board is ratified. Very good response. Ballots continue to come in.

### **Brand Awareness / Community Awareness Final Report from Melanie Kosaka**

Melanie did focus groups on public awareness, public opinion on environmental issues, ways to engage donor support. Excluded TOC members or anyone associated with TOC. Got baseline understanding, particularly those under 35 years old, see why they would contribute. Has recommendations from these focus groups.

Found younger people had not heard about TOC. Sierra Club most recognized environmental group. Also Nature Conservancy, Blue Planet, Surfrider (all mainland groups). Local groups recognized were Aloha United Way and Kahea. TOC got mentioned by one person. Environmental advocacy and preservation a crowded field.

More than 75% said awareness of an environmental group made through employer who set-up events like beach clean-ups. Consider doing outreach via employers. Create special volunteer events or tree planting events by approaching specific employer groups. TOC has gotten occasional request. Example, Hawaiian Airlines needed event in 2 weeks for 50 people. Meant throwing something together quickly, not easy without more notice.

Survey participants more likely to become members if asked by friend or family member. 70% said they would support organization that provides educational activities for themselves or their family. This was similar to TOC survey. Suggestion made to invite current donors and members to activate their children or grandchildren. Events for families. Create garden tours, how-to classes and opportunities to connect socially with other members.

Across all groups, climate change ranked number one concern. Ocean pollution also big concern. Should leverage TOC record as it relates to climate change to reach younger groups. Talk about Shade Tree Commission.

Emphasize TOC was fighting climate change before it was a "thing." Come up with good campaign slogan. Slogan ideas: Advocating against climate change since 1912. Addressing climate change before 1912. Over a hundred years of saving the planet. Planting for the planet.

Climate change is such a big issue. Cumulatively we have an impact. Together we can save the planet by taking personal action by planting a tree. Not as overwhelming. Don't become hopeless. Address it – One Tree at a Time.

Over 100 Years of Saving the Planet . . . One Tree at a Time

Can't give a problem without a solution. Stress TOC works on advocacy on these issues. May not be planting all the time, we get city and state involved. Need to better frame our work often done behind the scenes.

### **Melanie's Services**

Melanie gave final report on focus groups and now working on Greenleaf. Was partially paid from money we got from grant.

She will be looking at internal survey results, once compiled, combine it with focus groups with younger groups, to inform our strategies going forward. Will continue work on Greenleaf, get us started with it and we take over after that. Another phase could involve corporate, larger communication strategy.

From her proposal, we funded \$16,000, \$6,000 deficit funding. Are we close to spending the money allocated? Ask Melanie to come to next Board Meeting.

### **Planned Giving**

Point of mailing: Let people know they should think about giving something to TOC and giving them options for them to think about.

Kathleen Bryan shared handbook: The Bequest Program Tool Kit, developed for Hawai'i nonprofits. Kathy will send to everyone. Makes 2 points: start with something small. Do not start with a lot of options with a lot of technical requirements behind it. Handbook gives examples of checklists, return cards people can send back to express interest.

Tool Kit strongly urges mention of planned giving on a regular basis in newsletters – need to incorporate into new Greenleaf - please consider us in your will or trust. Do a story every few issues about it.

Kathleen used these materials when involved with professional organizations and planned giving. Some materials may need review and updating, make sure in line with up-to-date info acquired from planned giving organizations like Hawai'i Community Foundation.

Before we proceed, need to decide: What goes into mailing. Have follow-up plan. Have infrastructure in place to respond to inquiries.

Infrastructure is specific information. Wording that someone includes in will or trust to provide a bequest or process for designating TOC as beneficiary. Or return vehicle or life insurance program or process for making donation of appreciated securities.

Kathleen strong urging, don't send anything until everything in place. She's working on final recommendation for flyer and infrastructure. Flyer will focus on wills and other bequests from trusts and beneficiary designations from IRAs, life insurance, giving of appreciated stock. Will not include annuities and remainder beneficiary information. Flyer should be done in next couple of weeks. Will need cover letter and return card for people to respond.

Include response card? Majority of gifts given to organizations, people don't send back anything. People change wills so not sure if someone would return a card saying they plan on leaving money to an organization. But if only one person returned the card would make it worth it.

Example of wording for response card:

I/we have included TOC in our will.

We are considering including TOC in our will and would like more information.

We need specific information on language to include in our will or in our trust.

Response would include simple things: language to make TOC beneficiary or contingent beneficiary (easy thing for people to do). Sample language to include in will (make your bank account payable upon death to \_\_\_\_\_, here is our tax number). Need information in writing, able to hand out or send to people who request it. Also place information on website.

Mailing will go to all members and anyone who has donated in the last 2-3 years, regardless of amount. Should send out planned giving mailing at least once a year. Hard copy more likely to stay on a person's desk. Maybe insert in hard copy Greenleaf. Push back mailing to early to mid-October. End of November is year-end appeal. In past, decided not to combine two mailings. Do separate mailings, fine as long as spaced out enough.

TOC already set-up to accept share of stock. Stock transferred to our brokerage account with Morgan Stanley. Can direct these inquiries to Kathy.

Kathleen volunteered to be the referral person when general queries come in.

### **Majesty III**

Consider publishing new edition. Need new photos or use photos from first two books. Crowd source people sending tree photos. Photographer Doug Peebles may have negatives from Majesty. Negatives from Majesty II are in office. In the past, books sold for \$45.

Joan & Scott will do exploration. Financial investment needed and process to recover our investment and come out ahead. Put together publishing costs. Find fulfillment companies who could handle sending orders. Put on Agenda for next month.

East Hawaii Branch – selling tee shirts through “Fine Art America.” No upfront costs. If something sells, they send money. Might be model for selling book.

Next Meeting: Wed. October 13, 2021 @ 3:30 pm

Submitted by Jackie Wah