



**Wood-Pawcatuck Watershed Association  
Fund Development Committee Meeting**

**Agenda**

**Friday April 3rd, 2015 1:30pm**

**Attending:** A. Desbonnet, C. Fox, E. Torello, H. Drew, J. Mackenzie (phone),

**1. Bloomerang Update**

How we are utilizing it? Update on staff's progress in its outreach tool development. How can we maximize its organizational impact? Should we give the board a tutorial at a future meeting? Should they be allowed access to Bloomerang?

**2. Fund Development in the Short Term**

- a) Membership Renewal Letter  
Discuss FD Com participation in drafting, primary elements of the letter, who/how many will receive it, etc
- b) Developing an Outreach Toolbox  
What must be in our outreach toolbox? What resources do we have, what requires further development?
- c) Spring Fundraising Campaign  
Achieve consensus on a short term campaign, develop a strategy and timeline, with a clearly defined and realistic goal.

**3. Fund Development in the Long Term**

- a) Populating the Committee
- b) Donors Relations  
How to categorize donors? How do we want to engage top givers? What would be the approach? What are their individual interests?
- c) Utilizing the WPWA Fund Raising Plan  
What good guidance does it provide? What tasks within can be phased in and when and by who?

**Meeting Notes:**

- 1. Discussion of status and use of Bloomerang as a member and donor tracking system. We expect to soon pass the 1000 contact threshold which will trigger a new (budgeted) Bloomerang subscription expense of \$220/mo. Most WORD formatted correspondence has been reformatted in Bloomerang. Software is adequately serving as clearinghouse for inventory and communication.
  - a. Some confusion re: differences in how a primary donor vs. spouse vs. household are treated and displayed. (EXAMPLE the Grants: household is inactive, but members of the household individually are all listed as active, Meghan is listed 2x with the same #1290)

- i. **ACTION:** Elise will ask Tech Help will be asked to define this more clearly.
- 2. Discussion of need for FDC support materials to assist in recruiting FDC members and WPWA Donors.
  - a. High Quality Strategic Plan layout
    - i. **ACTION:** Elise has a draft that Alan will review then proceed to next step
  - b. Tri-fold brochure
    - i. **ACTION:** Alan will develop a general use tri-fold, which will then get modified to FDC and/or member development use.
  - c. Elevator Speech
    - i. **ACTION:** Alan will craft this once a tri-fold is developed as the two must fit hand in hand.
- 3. Discussion of FDC activities
  - a. Near Term
    - i. Develop a list of watershed businesses and decide if they have the potential to be groomed as donor organizations.
      - 1. **ACTION:** Helen had a list of a "top 10" and will develop basic information on each (e.g., location, contact info, CO and other important people, past giving for similar causes, etc.)
        - a. Once developed this information will be entered into Bloomerang for donor development, as appropriate.
    - ii. Maximizing retention through upcoming membership renewal
      - 1. **ACTION:** Approximate 842 contacts will be solicited to renew membership in May. Of those 530 recent donors will receive a standard renewal letter, 309 will receive a "come back" letter. Renewals that have come in since 3/1/15 will be extended through 5/16.
      - 2. **ACTION:** ED will draft the 2 letters (focus on Thanks, Ask, Major 2015 initiatives) with comments on the drafts by Committee members. Based on results, the FD Committee will develop an outreach campaign to those that are non-respondent to maximize donor retention.
    - iii. Send out an "open ask" based on water quality monitoring to the membership via email for support.
      - 1. **ACTION:** Chris has a draft the FDC will provide comment to. Anticipated delivery is Tuesday April 14, 2015.
  - b. Long Term
    - i. Identify and mark, in Bloomerang, potential higher givers in membership roster, and develop a "next steps" process for their development.
- 4. Discussion of outside influences that FDC cannot address
  - a. A Member Development Committee is needed.
    - i. Considerable discussion was had noting opportunities for raising funds through programs and events. It was agreed however, that these types of fund raising were duties inherent in membership development/member activities, raising to the forefront a need for a WPWA Member Development Committee.
    - ii. It was noted that the much of the fuel needed for the FDC to work on is through membership, and particularly in the form of members as potential higher givers. It was agreed that a strong Member Development Committee is needed in order for the FDC to have the fodder it needs for development, and to be successful in the long-term.
    - iii. **ACTION:** Helen will have a discussion of Member Development Committee during the April meeting of the Board of Trustees.