



## Fund Development Committee Meeting

Date: November 16, 2023

Time: 4:30pm-5:30pm

### Welcome:

**Attendance:** Peggie Bauer, Pat Flicker, Lindsey Rennie, Ed Stracke, Lori Johnson

**Unable to Attend:** Sandie Westergren, Jeff Voit, Nancy Betts, Connie Cross

### 1. Planned Giving

- **Ed Update/KPI for Planned Giving Program**

Ed Stracke presented the information on Planned Giving. There is a conservative number of progress made. The total amount started at about \$280,000 but we did not receive any donations for the endowment fund in the third quarter. There have been 6 actual gifts so far in 2023. The total number of gifts received since the endowment fund was started is 30 and typically the gifts are from a small number of donors, but the gifts tend to be larger. Estate gifts is something we continue to talk about. He hasn't received any since he started with WACOSA. We are in a tough economic times and the last quarter was not kind terms of the market however we look at this month and it has come back quite a bit. Our KPI's are good and we have 4-6 people on the cusp of being Legacy Members.

### 2. Development

- **KPI's for Quarter**

- i. Pat Flicker shared information on the Lobster Fundraiser that took place earlier in 2023. She explained that we typically get 2/3 of the donation money at the end of the year (September-October). The other third comes in the beginning of January in the next year. Due to this delay, her end of the year numbers will not look the best, but they will even out in 2024.
- ii. Based on the St. Cloud area, they are calculating that non-profits are down 18%-20% in donations. We have 574 donations this year which is great. Last year we had 750.

- **Grants Updates**

- i. Pat is working on several small micro grants that will cover smaller needs. WACOSA raised \$706,000 this year and next year her goal is set for higher.
- ii. Peggy mentioned that it may be a good idea to research smaller cities around the St. Cloud Area to see if there are any more initiative WACOSA can be apart of. Pat Flicker made a note of this and will be researching.
- iii. Pat noted that WACOSA will be receiving \$100,000 for their bus grant within the next year but we won't that check this year. It will come in 2024.

310 Sundial Drive, P.O. Box 757

Waite Park, MN 56387

Tel. 320-251-0087 | Fax. 320-257-5199

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- Give to the Max Update  
The Board did have matching funds for the year, but it was less than the previous year. A few board members did not donate this year. Overall, the Give to the Max event went well but it is down this year.
- Year End Appeal Information
  - i. Social media video clips
- WACOSA Legacy Society luncheon  
16 Legacy guests attended this event and it was a great success. They played a great video that the WACOSA team created as a “Thank You” to the donors.
- Christmas cards going out to all who donated in past 12 months  
Pat will be sending hand addressed “Thank You’s” to all donors this year.
- 2024 – letters to donors with total contributions for the 2023 year  
Pat Flicker explained that she will be sending a final email push to donors with total contribution details.

### 3. Fundraising Events

- 2024 event updates
  - i. Date changed to September 14, 2024
  - ii. Site: Moose Lodge in Waite Park
    - 1. This has been officially booked for September 14<sup>th</sup>, 2024.
  - iii. To change the event name or not to change the name... that is the question!  
We are going to get the Development Group together to brainstorm on a new title for the event.
  - iv. Sponsorship end of year letter  
The sponsorship letter is in process and

### 4. Other

- Ed leaving and Pat taking over planned giving  
Ed Stracke will be leaving at the end of this year and has officially transferred Planned Giving responsibilities over to Pat Flicker and Nancy Betts. He is confident that they will do a great job as they have been partnering with him for several months.
- Lindsey Rennie will be contacting Jeff Voigt to confirm if he would still like to be apart of the Development Committee. He has not attended a meeting in over a year.