



WACOSA Fund Development Committee Meeting

Thursday, February 15, 2024

4:30-5:30

Zoom Link will be sent separately

Attendees: Pat Flicker, Sandi Westergren, Peggy Bayer, Connie Cross, Lindsey Rennie.

Did Not Attend: Lorie and Julie Haag

1. Planned Giving Report

Pat is splitting her KPI's into three different areas

- General Operating Funds
- Designated – Auto Parts Heads Quarters. Our goal was \$375,000 and we have received \$50K for Quarter 4 of 2023 and hoping for the rest in 2024.
- Endowment Funds

KPI for WACOSA Legacy Society

1 New member for the Legacy Society. Currently 20 people. Pat is working on 4-5 people they will potentially join the Legacy Society.

- KPI for Endowment
 - i. Distribution for 2024

2. Capital Gifts Report

- KPI report for APH and other capital gifts

3. Development Report

- KPI's for Quarter
 - i. Review and look at trends.
 - ii. Budget vs KPI
 - 1. For 2024, our budget is \$827,000. APH has been moved down to \$300,000.
 - iii. New Donor Management Software
 - 1. Salsa – Donor Management Software contract for three years. They are not going to make any updates to the product but will be maintaining it. They are in the process of reviewing/selecting a new software. Would like to do monthly giving and have them go into the same program.
 - iv. Action Items for different areas and ways to increase donations/create awareness.
 - The board would like to see an agenda that is consistent across all committees
- Grants Updates
 - i. In-progress update:
 - ii. Up-coming update: Exciting grant opportunities coming up. At the end of the month there is a grant that is due. This would be for a mural for the Senior Center. The City Hall has an RFD out. They are looking for a mural for the entryway and whoever wins,



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will receive \$25,000. WACOSA cleans at this location and it would be a great representation within the communities.

We got 1 bus this year and there is another bus coming.

Within the next week or two, they are hoping to receive a grant that will pay 80% of a minivan. It is going to be a great year for grants.

iii. Civic Organization/Other

• Campaigns

i. Past campaign results and trends

End of the year campaign went well. It was close to \$40K.

ii. Upcoming campaigns

We will have a spring campaign. She would like to do one each month once she has the donor software.

iii. Action Items for different areas and ways to increase donations/make it better.

Pat is being aware of what people need. She is making more personal calls and giving a thank you. She will continue building and developing these relationships. She got a lot "no's" in January. It was an odd month, but she covered her avenues well.

4. Fundraising Events

• Large Fundraiser (BASH)

i. Where we are at in planning process

- Pat has a call in for a proposed menu option.
- Having the clients go to mix-it up and have them make bars. They would be made by the clients.
- Still looking to have a drink special.
- Creating a new logo and look to it. They would plan to use this logo, year to year.
- Food tickets would be \$20.00
- Will keep the silent auction. Will start requesting in May

ii. Action Items for event

• Other Fundraisers

i. Upcoming

ii. Action Items

- Adding another development committee member. If we could find someone with development experience, please share.

5. Other

- Anything else that needs to be addressed.

i. Julie Haag will be joining the Development Committee

6. Next Meeting



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- Recap all action items to review for next meeting