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Committee/Officer Report Submission

1 message

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To: mail@newea.org

Thu, Jan 20, 2022 at 5:07 PM

Executive Committee Meeting Date

January

Name of Committee or Office

Charitable Giving Task Force*

Activities/Decisions Since Last Executive Meeting

As Chair of the Charitable Giving Task Force, it has been my privilege to work with Task Force members and NEWEA staff over the past two years help promote fundraising activities and establish fundraising guidelines. Although the Task Force will be disbanded, we have had some initial successes in raising awareness of NEWEA as a nonprofit organization, primarily among our own members, and in being able to receive donations via www.newea.org/donate, as shown in the following table. (Thanks especially to Jordan Gosselin, NEWEA Communications/PR Coordinator; there is a direct correlation between her joining NEWEA and the increase in the donations/grants we have received!)

Online Donations* Online Auction Grants

2018 \$0 \$0 \$0

2019 \$1,216.41 \$2,673 \$20,000

2020 \$ 4,298.38 \$1,457 \$10,000

2021 \$3,929.50 \$1,999 \$0

*Excludes donations made to Kate Biedron Memorial Fund, which is accounted for separately, but includes online donations to our two other named funds, the Edward N. Nazaretian and Terry Campbell Memorial funds.

While this income certainly adds value, it is not significant enough to grow future, sustained programs or initiatives; for donations to become a significant part of our revenue stream, a commitment to fundraising, in terms of both staff and volunteer time, needs to become an integral part of NEWEA's long-term strategic plan. Therefore, it has been proposed that the Senior Management Team consider holding a planning session in 2022 to identify long-term goals and how they might need to be funded beyond our traditional sources of income. The SMT may want to consider retaining a fundraising consultant and even adding a staff member at an appropriate time to coordinate fundraising efforts.

Below is a 2021 summary and final report.

1. Success stories. Stories were developed and featured in the online NEWEA news, each of which included an appeal for donations. In 2022 and beyond, we urge everyone to contribute ideas for future stories that can be shared with our members and partners.

2. Named/memorial funds and special gifts. The Finance Committee is leading an effort to develop standard procedures for establishing future named/memorial funds, and guidelines for how funds should be requested, spent, invested, allocated, tracked and reported. The Finance Committee will coordinate with individual committees on how to access and use the funds. We urge every member of NEWEA to consider making a tax deductible gift, whether on an annual basis or as part of your estate plan.

- Terry Campbell Memorial Fund. In December 2021, we received sad news that Terry Campbell passed away. Terry's

wife, Anne Wright, has contacted NEWEA about establishing a memorial fund, probably a scholarship, in his honor. Mary Barry will coordinate the details with Ann, following the new guidelines being developed by the Finance Committee.

- Kate Biedron Memorial Fund. This special fund receives donations via the www.newea.org/donate page as well as <https://www.newea.org/kate-biedron-memorial-fund/>
- Edward N. Nazaretian Memorial Fund was established in 2017 to support the activities of the Young Professionals Committee. As of December 2021, the Ed Naz Fund has raised close to \$18,000, some of which will be transferred to the YP 2022 Summit budget. <https://www.newea.org/about-us/awards/edward-n-nazaretian-memorial-fund/>

3. Thanks to NEWEA Charitable Giving Task Force members

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Action Plan Committee/Officer Assignments

Charitable Giving Task Force to be disbanded, January 2022

Report Submitted by

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Date Submitted

01/21/2022