

Meeting Summary

Topic: 2008 Campaign Vice Chairs Meeting at HSBC	Date: May 21, 2008
Attendees: Paulette Crooke, Vincent Mancuso, Tim Doolittle, Drew Cerza, Tim Lafferty, Linda Graves, Arlene Kaukus, Karen Christie, Rema Hanash, Gayle Barton, April Lucey, Andi Ryder Suzette O'Brien	

Item: Reviewed Account Packet Format Using Wegmans Sample Packet

Discussion Notes: Account information was well received. The top 101 account list was reviewed and it was determined that the account packets should be used as the base for the development of new/expanded strategies to increase the \$\$ in the existing customer base. Each Vice Chair was challenged to pick the ten accounts that could improve the most and be rigorous about making that happen. To increase the success of this approach, it was decided to identify a group of key community leaders to meet with in small groups or one on one to review the top 101 accounts to assist in the identification of the potential for growth and development of strategies. The top accounts list will be further broken down by industry, by team and by ranking category.		
Next Steps/Action Items:		
What: Vice Chairs and staff will send the names of community leaders who might be helpful in the account review process to Linda Graves	Who: Vice Chairs and staff	When: by May 30
What: Prepare account packets for all top accounts on the list and high potential for the June 18 th meeting	Who: Staff	When: June 18
What: Paulette send a letter/email inviting selected community leaders to review the lists (in small meetings or one on one appointments)	Who: Linda/Denise	When: June 2
What: Have the top 101 list segmented by industry, team and category and add CEO name.	Who: Byron	When: June 1

Item: Discussed strategies to reach donors/prospects outside the workplace

Discussion Notes: The discussion from the May 1 st meeting was continued on how we might reach beyond the workplace to retirees, independent professionals, and others who are not reached by the traditional methods. The phrase Centers of Influence was used to describe the need to develop a way to reach these donors through Country Clubs, Associations or Neighborhood/Geographic approaches. Reaching out to company HR people to develop a way to retain a UW connection to the retiree was discussed.		
Next Steps/Action Items:		
What: Develop a marketing campaign to ask retirees to leave their mark/legacy on the community through UW	Who: Bob Morgan	When: Fall 2008

What: Recruit volunteer leadership for the section from those who fit into the category – retiree, independent professional. Names included : Ross Kenzie, Andy Shaevel, Stuart Angert	Who: Paulette/Karen	When: June 3
What: Develop a strategy to increase involvement and giving from the \$2500 to \$9999 givers	Who: Andi Ryder/Suzette	When: June 18th
What: Develop a pilot strategy for non workplace donors from direct mail through to the personal ask/touch.	Who: Karen Christie & Bob Morgan	When: June 18th

Item: Recruitment Updates

Discussion Notes: Everyone indicated they were underway with volunteer recruiting and needed no further assistance. Paulette reiterated that this was a top priority and everyone agreed.		
Next Steps/Action Items:		
What: Recruit volunteers into each of the boxes	Who: Vice Chair	When: June 18th

Item: Summary

Discussion Notes: Action plan recap: names of community leaders to enlist for help identifying how to increase giving in top accounts, preparation of the account information packets and subsets of the lists, further work on strategy for donors outside workplace channel, and complete recruitment.
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- ❖ Who needs to get this summary? attendees _____

- ❖ File where: campaign 2008 cabinet meeting may 21