

Southington Education Foundation
Executive Board Meeting
February 11, 2014

Minutes

Attendance:

D. Miceli, J. Galati, B. Pestillo, A. DeBisschop, T. Sheffy, K. DiFusco, B. Hosmer, S. Proffitt, J. Erardi, Rick Veilleux, Jerry Belanger, Michelle LeBrun Griffin

Call to Order: Made by Dawn at 6:30 p.m.

Approval of Minutes: Motion made by Beth P. to approve the 1/14/14 minutes. Motion seconded by Beth H. Motion passed.

Treasurer's Report: Motion made to accept the treasurer's report as read by Beth P. Motion seconded by Alan. Motion passed.

Chairman's Report: There is a new Southington magazine being published. Dawn has been asked to write an article about the SEF for their first issue.

Vice-Chairman's Report: The next Board at Large meeting will be 6:30 on Thursday, March 6 at South End School.

Fundraising:

The Panera Bread Fundraiser will be held this Saturday, February 15th from 4:30-6:30. Please stop in during that time and enjoy a meal, baked good and beverage for \$10. All money raised will be donated to the SEF.

The 4th Annual Community Adult Spelling Bee will be held on April 23rd at 7pm in the Southington High School auditorium. We have a few teams that have already signed up. Alan has secured Joe Furey, Fox CT Chief Meteorologist, as Bee Master. We may be in need of a judge for the event. Entry forms are available online at www.southingtoneducationfoundation.org

New Business: Presentation by Guy Iaccarino with an overview of CiviCRM and how the SEF could benefit from this relationship/data management service.

The presentation is available for viewing on the attached pages.

Motion to Adjourn: Motion made by Beth P. to adjourn and seconded by Dawn. Meeting adjourned at 7:55 p.m.

Next meeting: March 11, 2014 at 6:30 in the Municipal Center

Respectfully submitted,

Bethany Pestillo

Secretary

CiviCRM Overview



Guy Iaccarino
Greenleaf Advancement

CiviCRM (civicrm.org)

is a web-based, open source, Constituent Relationship Management (CRM) system geared toward meeting the needs of non-profit groups and other civic-sector organizations.



Greenleaf Advancement
(greenleafadvancement.com)
in Guilford, CT specializes in
implementing, hosting,
supporting, and providing
training for CiviCRM.



Constituent Relationship Management

Track

Communicate

Engage

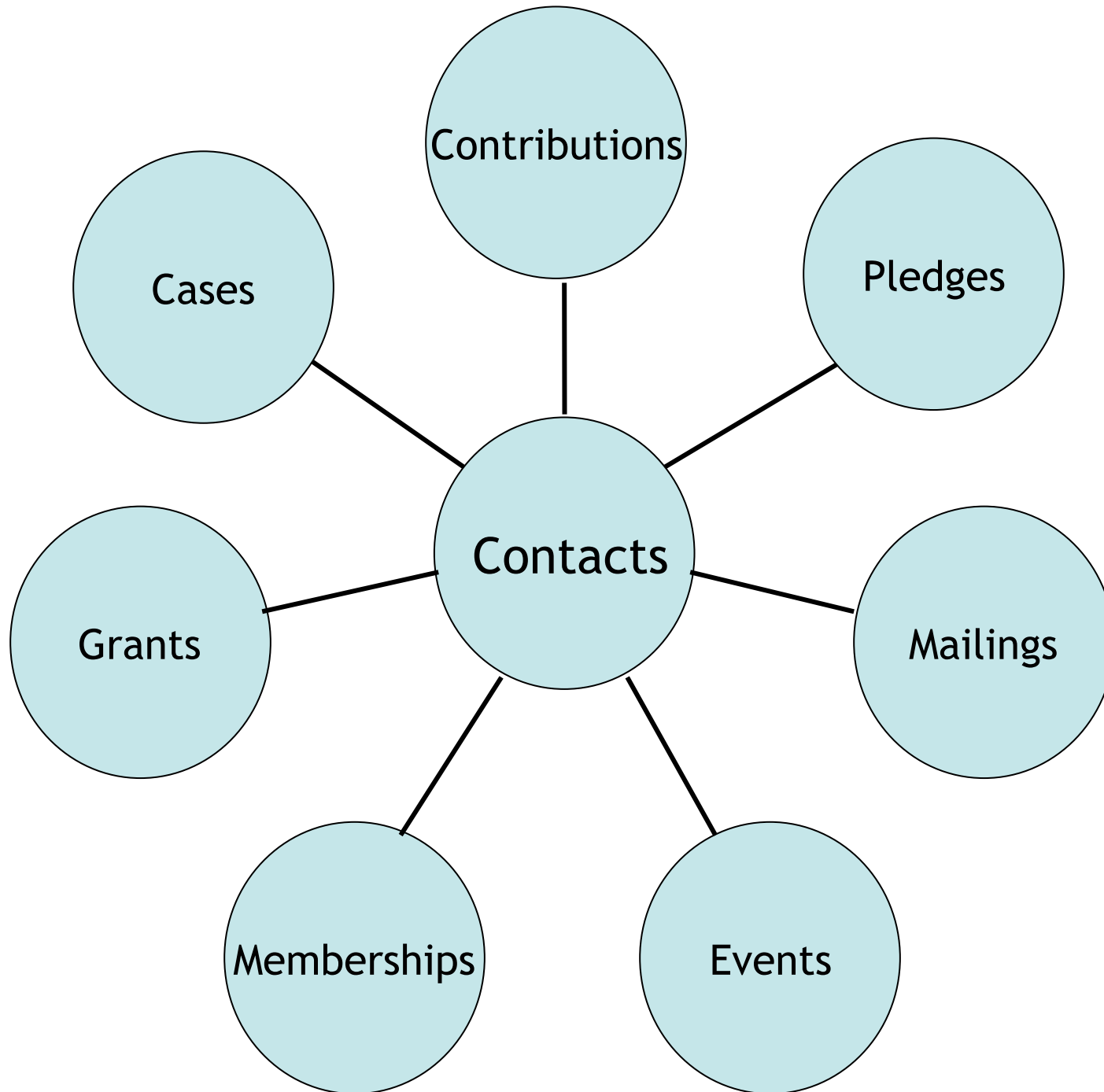
donors, funders, prospects, volunteers, event participants, board members, vendors...



Data Types / Modules

1. Contacts
2. Contributions
3. Pledges
4. Postal Mailings
5. Bulk Email
6. Events
7. Grants
8. Volunteers
9. Bulk Texts
10. And more...





**Integrate Data and
Functions** currently spread
across many systems: excel
spreadsheets, databases, bulk
email, event registration,
payment providers, and more.



Contact Management

- Addresses, Phone, Email
- Demographics
- Relationships
- Communication Preferences
- Log all interactions



Fundraising

- Solicitation letters
- Thank you letters
- Gift tracking
- Pledge tracking
- Online giving



Communications

- Letters
- Bulk Email
- Individual and Small Group Email
- Bulk Text



Events

- Registration
- Payments
- Multiple Roles
- Volunteers
- Reminders
- Tell a Friend



- Highly customizable
- Access with web browser
- Website integration
- Configurable access control
- Continually improving



Key Benefits



Unified View of Relationship Data

Better relationship management
leading to better results



Reduced Administrative Overhead

Minimize time spent moving data between systems, or worse, moving between systems to find all the data you need



Lower Total Cost of Ownership

- No per seat charges
- No upgrade fees
- No proprietary software



Open Source Flexibility

- No vendor lock
- You own the source code
- Join with others to request or fund feature changes



Training & Support

- Proven implementation process
- Weekly training webinars
- CTCEF staff and other CTCEF users provide additional resource
- Currently serving 11 CT LEF's as well as the CTCEF itself



CiviCRM Overview



Guy Iaccarino

Greenleaf Advancement

203-624-4636 | guyiac@greenleafadvancement.com

PO Box 617, Guilford CT 06437

Website: greenleafadvancement.com

LinkedIn: www.linkedin.com/in/guyiac

Twitter: twitter.com/greenleaf_adv