

To: Board of Directors
From: Ralph Scorpio
Date: December 16, 2024

1. Our annual appeal — the first from Accola—mailed in early November, and reactions have been positive. I have been receiving about 3-4 phone calls per week from donors seeking additional information and clarification. Their questions have mostly been about the status of St. Mary’s Health Clinics with Accola and the Province and also about the Sisters’ ongoing role with Accola. Some wanted to be reassured that their donations still support the ministries/programs that they have supported in the past through the Ministries Foundation. These questions have led to good conversations.

Many donors wrote out their checks to Accola, while some still wrote out checks to the Ministries Foundation. This transition will take a while, and fortunately we can cash checks written either way. We also sent the Accola FAQ sheet to donors who used envelopes other than the new Accola reply envelopes.

Considering we mailed a month later than last year, our YTD fundraising is doing rather well. The next two weeks should be busy, too. After January 1 we will look closely at our list of donors and see if we “lost” any in the transition so far, especially at the \$500+ levels. We will still have half the fiscal year left to bring them back.

I am waiting on four estates to settle in the next month or two. Three of these would be added to the “Board Designated” estate gift revenue.

In the Spring we are planning an on-line auction (to replace the Celebration) and a fund-raiser for Sarah’s. . . an Oasis for Women. Both of these should help bring the Events budget line up to goal.

2024-25 YTD Solicitation Revenue								
		12/16/2024						
			2024-2025	2024-25	2023-24	2023-24	2023-24	
			YTD	Budget	YTD	Budget	Year-End Actual	
	Revenue							
4130	Grants		10,300	50,000		10,000	10,000	
4200	Undesignated Gifts		254,890	700,000	270,837	600,000	561,865	
4290	Service Fee Income		35,435	80,000	22,725	115,000	59,000	
4330	Transition Expenses Fundraising Effort		60,000	25,000	35,000	300,000	45,500	
4853	Planned Giving (Board Designated)		89,597	100,000	237,627	100,000	782,166	
4365	Events Revenue		5,109	35,000	6,892	350,000	294,254	
	Total Revenue from Solicitation		\$ 455,331	\$ 990,000	\$ 573,081	\$ 1,475,000	\$ 1,752,785	
			YTD 2024-25	Goal 2024-25			2023-24 Total	
	# of Donors		424	1,600			1,381	
	# of New Donors		59	350			267	

2. Our annual and long-term giving plan focuses on two main initiatives:
 - 1) keeping existing donors as we transition to Accola, with attention on increasing gift amounts; and
 - 2) prospecting and nurturing new donors.

This has become the main focus of the Advancement Committee. Two board members have stepped up in the past month to help us with these initiatives. Kris Smyth invited 5 long-time donors to her home to meet Matt and learn more about Accola. Three of the guests were former board members; one a former board chair. It was a great conversation. Mary Lydon invited a couple who had joined her at Septemberfest to meet with me to learn more about Accola. Again, it was a great conversation, and I have followed up with invitations to visit the programs after the holidays.

I'm sure every board member has friends or contacts that can be introduced to Accola this way. Please think of one or two individuals or couples that Matt or I or both can meet early in 2025. If everyone does this, we have the potential to add up to 50 new donors in remaining months of this fiscal year and into the future. This would make a great New Year's resolution! Call me at 651-690-7097 to discuss.

3. Two Advancement staff members (Peggy Summers and Paul Tatro) joined me in a planning session with Tangelo Tree consultants as we discussed the Theory of Change and how it involves and includes the Advancement Office. It was great to have Peggy and Paul share their perspectives. They will also join the wider group at the January Theory of Change retreat.
4. Our Volunteer Coordinator was hired in early November for this new, half-time position. Leslie Aktan, who also works part-time at Wisdom Ways, will be coordinating and managing all of Accola's volunteer needs. Leslie has already prepared a clear and consistent volunteer application, is working on background checks, and has met with LIS and Sarah's staff to prioritize their volunteer needs. She is also preparing for volunteer recognition events in the Spring as a way to better connect volunteers with all of Accola. These will include the parents of the high school student volunteers in our programs, as a way to introduce them to the programs their children have served at. One goal of a successful volunteer program is to nurture volunteers and their families to also become donors.

Thank you for all you do for Accola!