



**Advancement Committee Meeting Minutes**  
**Thursday, January 9, 2025**  
**9:30 – 11 AM**  
**Via Zoom**

**Present:** Kevin Berg; Marjie Blevins; Stacy Jacobson; Brian Mullen; Joel Rainville; Mark Richards; Gabrielle Rohde; Kris Smyth

**Staff:** Matt Halley; Ralph Scorpio; Lacy Sietsema

**Not Present:** Stephanie Klenk; Maya Missaghi; Fr. Larry Snyder

The meeting began on Thursday, January 9, 2025 at 9:32 a.m.

**DEI Statement:** Ralph read the DEI Statement.

**Prayer:** Joel read the prayer.

**Minutes:** The November minutes were presented for approval. Hearing no changes or corrections, Brian moved to approve the minutes and Mark seconded. All present members voted to approve the minutes with Marjie abstaining due to an excused absence.

**YTD Advancement Report**

Ralph reported that undesignated gifts have been down. Peggy is pulling a list of those who donated last year but not this year. These donors will be reached out to and recovered. Memorial gifts are also lower than at this time last year. Service fee income is up and planned giving is average. There was a discussion about the level of communication between Accola and the donors. Lacy explained that along with the Annual Fund solicitation, emails were sent out in September and during Give to the Max. Ralph explained that the missing donors might need an extra step to realize that while Accola is new, it is still doing the same work. It was pointed out that St. Mary's Health Clinics have been aggressive about encouraging donors to donate directly through them, as opposed to Accola. Kevin suggested making the list of the missing donors available to committee and Board members so that phone calls could be made. Joel suggested adding a 2023-2024 YTD column to the success metrics so that it will be easier to compare where giving is at.

**Review & Discussion: Advancement Action Plan**

The Advancement and Marketing Committee reviewed its action plan for FY25. Ralph explained the relationship between Learning In Style School and Blake School. There is great potential to introduce service opportunities to Blake students. Blake School can help raise the visibility of Learning In Style. Gabi explained her relationship with Blake and is willing to set up a meeting for herself, Ralph, Matt, and some of the coordinators at Blake. Kevin added that there may be potential to set up a similar partnership with Cretin-Derham Hall.

Ralph reviewed another section of the action plan. He explained that Kris held a small event at her home to

educate potential donors about Accola and its programs. She explained who she invited and how she facilitated the get-together. Ralph added that site visits and lunches are also available as a way to connect with donors. Joel suggested having a small meeting to go over this initiative and it can be introduced at the February Board meeting. Kevin suggested adding it as an agenda item at the January Executive Committee meeting as well. Matt suggested creating a document around this strategy that contains FAQs, goals, specific expectations/steps, and follow-up examples.

There was a discussion about ways to obtain new donor prospects. Ralph has created a list and he would appreciate feedback and other ideas to add to it. He added that many Board members have connections with professional and civic groups. Matt could potentially use these connections to present Accola to a wider audience. There was a discussion about social media and developing a strategy around key messages to different audiences. Ralph stated that he and Lacy will organize a calendar for social media and print marketing for the next six months.

Ralph reported that a top priority on this work plan is to reach lapsed donors. He is developing a strategy for this priority.

#### **Review of Committee Work Plan**

Joel presented the committee work plan. He reviewed the goals, key deliverables, a schedule, and responsible parties. There was a discussion about events and financial expectations. Hearing no further feedback to the work plan, all present committee members voted to approve it.

#### **Discussion: Communications Plan**

There was a discussion about the relationship with Parenteau-Graves and the resources need to implement a communications plan. Matt stated that Parenteau-Graves was responsible for helping with the launch of Accola. Joel suggested that he, Ralph, and Matt meet to discuss next steps.

#### **Board Engagement**

There was a discussion about increased Board engagement. It was suggested that Accola FAQs and some communications/marketing material could be uploaded to the Board Portal.

#### **Update: Volunteer Coordinator**

Leslie Aktan has been hired to be the part-time Volunteer Coordinator at Accola. Her role will increase community engagement and increase program visibility.

#### **LIS Open House Attendee Follow-up Report**

Elisabeth is doing follow-up calls and notes to those who attending the Learning In Style Open House.

#### **Upcoming Events/Announcements**

Ralph reported that there will be no Celebration this year. However, there will be an online Silent Auction between April 2-11. He added that Accola will need help getting items for the auction (gift cards, experiences, vacations, etc.). Mimi is working on two additional events for Sarah's... an Oasis for Women. These events will be an open house and a trivia night.

**Adjournment:** Meeting adjourned at 11:04 a.m.

Respectfully submitted,

Lacy Sietsema, Accola