



To: Board of Directors  
 From: Ralph Scorpio  
 Date: February 18, 2025

- Calendar year-end responses from our annual appeal — the first from Accola—did well but is tracking approximately \$40,000 behind last year. In January we counted 420 donors who had given a total of \$110,000 last year by December 31, 2023 but not yet this year. Most of these donors had given between \$50 and \$100 by December 2023. We re-solicited them in late January. Returns are coming in now, and we’ve recaptured a few dozen of them. We are working to recapture all of them, which will close the gap.

**2024-25 YTD Solicitation Revenue**

2/17/2025

Revenue	2024-2025 YTD	2024-25 Budget	2023-24 YTD	2023-24 Budget	2023-24 Year-End Actual	
4130 Grants	10,300	50,000	30,000	10,000	10,000	
4200 Undesignated Gifts	379,521	700,000	419,883	600,000	561,865	
4290 Service Fee Income	45,612	80,000	41,467	115,000	59,000	
4330 Transition Expenses Fundraising Effort	60,000	25,000	45,000	300,000	45,500	
4853 Planned Giving (Board Designated)	106,877	100,000	402,507	100,000	782,166	
4365 Events Revenue	8,236	35,000	8,320	350,000	294,254	
<b>Total Revenue from Solicitation</b>	<b>\$ 610,546</b>	<b>\$ 990,000</b>	<b>\$ 947,177</b>	<b>\$ 1,475,000</b>	<b>\$ 1,752,785</b>	

	YTD 2024-25	Goal 2024-25	2023-24 Total
# of Donors	607	1,600	1,381
# of New Donors	77	350	267

I am working on three estates that should settle in the next few months. Two of these would be added to the “Board Designated” estate gift revenue.

- Since January 1, Accola has submitted multiple grant requests, including those to:
  - Ameriprise Financial (\$25,000 for Sarah’s on 1/14/25)
  - The Marbrook Foundation (LOI for \$20,000 for Sarah’s on 1/23/25)
  - Looking Out Foundation (\$25,000 for Sarah’s on 1/24/25)
  - Dollar General Literacy Foundation (\$10,000 for LIS on 2/5/25)
  - and Minnesota Legal Association Foundation (\$3,000 for Sarah’s on 2/21/25).

Upcoming submissions include:

- Catholic Community Foundation (Sarah’s) on 5/10/25
- Wish You Well Foundation (LIS) on 9/1/25
- and Butler Family Foundation (Sarah’s) on 12/15/25.

Other LIS submissions to US Bank and Lenzmeier Family Foundation remain flexible.

Several grant requests were declined, including those to  
CenterPoint Energy Foundation (\$50,000 for LIS)  
Deluxe Corporation (ERG) (employee-dependent amount for LIS)  
Saint Paul & Minnesota Foundation / Bush "IDEAS" Fund (\$10,000 for Accola General)  
AmFund Golden Pear Award (\$25,000 for Accola strategic)  
Securian Financial (\$50,000 for Accola general)  
and Blaze Credit Union (\$10,000 for Sarah's)  
totaling \$150,000 in declined requests.

3. In March we will counter "March Madness" with "March Kindness: 31 Ways of Being Kind." These daily emails to our donors and supporters will identify one kindness activity that they can do to spread kindness. It's not a direct fund-raising activity but a way to get the Accola brand and activity in front of people in a consistent, helpful way. (Although a few days will include specific ways to support Sarah's, LIS, and WW.) A fact sheet on this is on the portal in the Fundraising folder. We encourage you to share this activity with others. It will help us introduce Accola and its programs to others and increase our email list. And maybe also help make the world a kinder place!
4. April we are planning an Accola On-line Auction (to replace the Celebration) from **April 2 - 11**. This is a great opportunity for Board members to participate by spreading the word, donating an auction item or money to help purchase auction items and gift cards, and bidding. **The Fundraising folder of the board portal includes a letter to you describing all the ways you can help, a fact sheet about the online auction, and another letter that you can tweak and email to friends and family.** We do need your help and support for the auction to be a great success.
5. A fund-raiser for Sarah's. . . an Oasis for Women is scheduled for June. Preliminary plans include Sarah's hosting this on-site, preferable outside under a tent. Details will soon be shared with the Board through email and the Board Portal.
6. Keeping existing donors now that we are Accola, with attention on increasing gift amounts; and prospecting and nurturing new donors are the main over-all initiatives of the Advancement and Marketing Committee this year. Joel will talk about this at the Board meeting. We also have uploaded several "how -to" documents to the portal's Fundraising tab, everything from "How to talk about Accola" to "How to Host a House Party" to "How to use Facebook and Instagram to Help You Fund Raise."

We know every board member has friends or contacts that can be introduced to Accola this year. We want to make it easy for you. Please think of one or two individuals or couples that Matt or I or both can meet between now and June 30. Ralph will call you! 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.

7. Leslie Aktan, our part-time Volunteer Coordinator who was hired in early November, has been very busy.
  - Leslie Aktan and Katie Cornet, WW Programs and Events Specialist, will table at St. Kate's internship networking event Thursday, February 20, 11-1 pm.

- On Saturday, February 8, Leslie Aktan, Volunteer Coordinator, attended the Minneapolis Community Connections conference at the Minneapolis Convention Center and tabled for Accola. There were over 250 organizations in attendance. There were several organizations working with immigrants and refugees that did not know about Learning in Style and Sarah's. Accola's presence was well received and highly important. Next year, Leslie will return and recommends a second Accola representative, particularly someone from Learning in Style, table as people had lots of questions about attending classes. With a 2<sup>nd</sup> person present, one can take materials and walk around networking with the other orgs while the other sits at the table to share information with attendees.
- Professor Susan Myers, University of St. Thomas will have her class begin volunteering at Sarah's in groups of 3-4 on Thursday evenings, 6-8 pm tutoring and holding conversational English classes with the residents.
- White Bear Unitarian Universalist Society has 9 volunteers signed up and background checks completed to match up one on one with the residents of Sarah's to volunteer when needed.
- A social work student will complete her hours at Sarah's as the wellness and health coordinator.
- Spring activities 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!