

To: Board of Directors
 From: Ralph Scorpio
 Date: October 14, 2024

1. The Advancement Office activated the transition/launch plan created by Parenteau Graves in late September. Thank you to the 13 board members who called donors the week of September 30. With your help we made contact with approximately 200 donors before they received the email announcing Accola.
2. We continue to develop strategies and policies for internal communications. Ongoing communications plan developed and shared with the Senior Leadership Team (SLT). This will go to Parenteau Graves for input and further guidance.
3. Our annual and long-term giving plan has been developed and shared with SLT and Advancement Committee. Will go to Parenteau Graves for input and further guidance. Advancement Committee also reviewed and affirmed the 2024-25 Advancement Committee Work Plan.
4. Our social media, and website will launch soon after with our new brand. Wrapping up work this week with Parenteau Graves on our first Accola annual appeal that will launch the new brand to donors. The appeal letter is finished, and a new brochure is in its final stages. Our appeal will mail by the end of October.
5. I am working on hiring a Volunteer Coordinator. This is a new, half-time position. I have crafted a Volunteer Coordinator job description that was approved by Kim Wagner in HR. I am now in the hiring process. Should hire by the end of October.
6. I have redesigned the monthly fundraising report to more closely match the format of the financial statements. This should help all board members track the funds that come in and where they go.

As usual, our summer months were slow revenue months, and this continued into September while we delayed the appeal until the brand launch was established. Nevertheless, we had a stronger first quarter than last year (+\$171,000).

2024-25 YTD Solicitation Revenue

	2024-2025 YTD	2024-25 Budget	2023-24 YTD	2023-24 Budget	2023-24 Year-End Actual
Revenue					
4130 Grants	5,300	50,000	0	10,000	10,000
4200 Undesignated Gifts	81,821	700,000	61,387	600,000	561,865
4290 Service Fee Income	12,235	80,000	7,280	115,000	59,000
4330 Transition Expenses Fundraising Effort	60,000	25,000	-	300,000	45,500
4853 Planned Giving (Board Designated)	84,828	100,000	500	100,000	782,166
4365 Events Revenue	3,500	35,000	6,892	350,000	294,254
Total Revenue from Solicitation	\$ 247,684	\$ 990,000	\$ 76,059	\$ 1,475,000	\$ 1,752,785



	YTD 2024-25	Goal 2024-25	2023-24 Total
# of Donors	204	1,600	1,381
# of New Donors	36	350	267