



Advancement Committee Meeting Minutes
Thursday, October 10, 2024
9:30 p.m. – 11:00 a.m.
Via Zoom

Present: Kevin Berg; Marjie Blevins; Stacy Jacobson; Maya Missaghi; Brian Mullen; Gabrielle Rohde; Kristine Smyth; Fr. Larry Snyder

Staff: Matt Halley; Mimi Pizzi; Ralph Scorpio; Lacy Sietsema

Not Present: Stephanie Klenk; Joel Rainville; Mark Richards

The meeting began on Thursday, October 10, 2024 at 9:30 a.m.

DEI Statement: Lacy read the DEI Statement.

Prayer: Ralph read the prayer.

Minutes

The September minutes were reviewed. Hearing no changes, Stacy moved to approve the minutes and Kris seconded. Six out of eight present members voted to approve the minutes. Brian Mullen and Fr. Larry Snyder did not attend the September meeting and abstained from voting.

Accola Launch Update

Matt reported that it has been a pleasure to make the transition into Accola. The new website is live and will improve over time. All programs still have individual sites. Social media has been updated. Matt expressed appreciation to the Board for its help in making phone calls to key donors/stakeholders.

Advancement Committee Action Plan

Ralph reported that this committee is a combination of Advancement and Marketing. He reviewed the action plan, which states specific goals, responsible parties, provides a timeframe, financial goals, and success metrics. There was a discussion about the creation of a new signature event.

A major goal of this committee is finding a way to keep donors engaged. More Board help is needed to keep people connected, whether it's with casual conversation or hosting people for coffee. Ralph would also like people to share social media posts.

YTD Advancement Report

The Advancement Report now has a new format. This format is simplified, with six main categories, and matches the financial statement. The only revenue stream not listed is the PIM investment

allocation. The grants line does not include Paul's work for SMHC. This report only shows the operating revenue for Accola. The Annual Appeal will mail by the end of October.

There was a conversation about how Paul divides his grant writing time between Accola and SMHC. Now he devotes about 80% to SMHC and 20% to Accola. This may change over time. Matt reported that because Accola is brand new, there are currently fewer grant opportunities for the Accola programs. This will change when Accola obtains a couple more 990s and additional annual reports.

Matt expressed appreciation for the clarity of the Advancement Report. It was acknowledged that there hasn't been a lot of time to raise funds. However, Accola is off to a good start this fiscal year. There was a discussion about future funding opportunities. This committee will continue to maintain current donors and strategize ways to obtain new donors. Gabi reported that Blake hosts a breakfast for alumni of Blake School. She offered to attend, possibly with Maya and Elisabeth, to move this relationship forward. Marjie offered to join Gabi.

Discussion: Events

Ralph stated that this committee needs to think about which types of events are appropriate for Accola. Maya suggested creating social events for people to attend (foodie event, brewery event, art event, etc.). This could be a way to bring in new donors. The annual Advent Calendar was discussed. There are ways to make an Advent Calendar without it being overly spiritual. Gabi suggested making a physical calendar this year, as well as maintaining a digital calendar. Accola is about neighbors and this would be a good vehicle for spreading the heart of what Accola is and its messages. Mimi offered to start an Calendar Subcommittee. Gabi and Maya will be on this subcommittee.

There was a discussion about expenses and fundraising goals for events. Mimi reviewed a few events that are currently scheduled. Wisdom Ways is celebrating its 30th anniversary. It will host a labyrinth tour and a ritual/reception. The Advancement department will have a Bingo night in November. This information has been emailed out to all Board members. Matt stressed the importance of success metrics for each event.

Mimi reported that she will meet with program directors and go over possible events for each program. The Advancement Committee discussed other possible events, including a virtual silent auction in place of the Celebration.

Ralph stated that more detailed projections with goals, expenses, and success metrics will be drafted.

Adjournment: Meeting adjourned at 10:47a.m.

Respectfully submitted,

Lacy Sietsema, Accola