**Prosperity Connection**

**External Committee Notes**

*January 18, 2024*

*11:00 a.m. – noon (CST)*

*1310 Papin St. | Suite 403 | St. Louis, MO 63103*

*Agenda*

1. Call to Order – Attendance: Felicia Pulliam, Nikki Woelfel, Carly Carsomino, Will Holleman, Nikki Whetsell, Kathy Siddens, Ben Feimer, Megan Riechmann, and Carol Harris
2. Marketing and Communications
   1. Outreach stats (see slide deck on Portal) Hoping to streamline presentations and stats to align with KPI’s in the future. Outcomes are the most important part of marketing strategy.
   2. Outcomes (coaching sessions, credit report reviews, and class pull-through)
   3. Questions:
      1. Do we have #’s on people who sign up vs. show up
3. Institutional Advancement
   1. Recent gifts – Light a Single Candle, Edward Jones, Pecha Family Foundation, County Credit Union
   2. Invited or researching – Wells Fargo, Midland States Bank, James S. McDonnell Foundation, Women’s Foundation, Focal Point Impact Grant (this is all tied to our growth pillar and expanding funding sources.)
4. Updates
   1. ESFE Program – Employee Sponsored Financial Education – Ben Feimer is heading this up as our Business Development Officer. Working with Parkside Financial currently. Equifax employee wellness event was highly successful. When will expansion take place? Coaching side is ready, it is the communication with partner companies for pricing packages, pitch, etc. need to be more finalized. National HR Association – St. Louis is a good resource. St. Louis Regional Business Council to pitch ESFE program. Will there be further follow-up with Equifax employees?
   2. Website – Major upgrade to give clients a “MyChart” type of experience portal.
      1. Salesforce integration will also be happening
   3. Client Celebration – March 14th. Mark Your Calendars
   4. What we need help with:
      1. Individual Donor Campaign Ideas:
      2. Give STL Day Ideas: KTRS radio spots leading up to Give STL Day, FOX 2 does organizational spots, KSDK Your Money Matters spots, with the goal of donations for Give STLDay. Will Holleman’s dad is on KTRS…we have connections. Will’s sister is part of STL Philanthropy…He will reach out.
5. Adjourn