**Prosperity Connection**

**External Committee Agenda and Notes**

*Sept 19, 2024*

*11:00 a.m. – noon (CST)*

*Zoom*

*Agenda*

1. Call to Order – Attendance – Will Hollemann, Tom Boyle, Carly Carmosino, Kathy Siddens, Julianna Nikodym, and Carol Harris.

**See portal for detailed presentation**

1. Marketing and Communications
   1. Outreach stats – down a little in social media clicks, but we have been focusing on other areas. Facebook lives have been very popular. Incredible class pull through rate. Volunteers calling to remind people about the class they have registered for has been very helpful and made a huge increase in class attendance.
   2. Outcomes – we are ahead/on track with coaching numbers, classes, and credit report reviews.
2. Institutional Advancement
   1. Recent gifts & Earned income updates- Tracy Family Foundation added a $5000 Capacity Building Grant, County Credit Union $100, and MCA $2500
   2. Research/Applications– Q4 RGA, Centene Foundation, Deconess Foundation, and Midland States Bank. Big application to James S. McDonnell request for $800K. We have advanced to the second round.
   3. Kathy and Robert are attending “speed networking” event to talk with bankers tonight.
3. Updates
   1. Breakwell – 3 classes listed on the website for corporate training
   2. Corelogic – We have been given the ability to do tri-merge credit pulls via our Salesforce. This is critical for clients who are looking to purchase a home.
   3. James S. McDonnell Foundation Grant – submitted an $800K proposal for a pilot program to help clients start and maintain an investment account. Partnering with CCRI to access data. We made it to the second round and are in the process of enhancing the proposal and answering their questions to submit on September 30th. Kathy will send the grant proposal with the committee via email.
4. What We Need Your Help With:
   1. Board Retreat feedback – Very helpful and great to meet and see the other committee and board members and to see the big picture.
   2. Day of Giving 2025 – want to still support Give STL Day but want to host our own so as to not compete with all nonprofits in the region. Ours will center around our client celebration.
   3. Funder outreach assistance - We need help filling in gaps on reaching out to support and sponsorship for individual donors and funders. We are in a stronger position now than we have been in the past.
      1. Will has a lot of contacts via Edward Jones and St. Louis Regional Business Council.
      2. We can share the pitch deck and “one page” with IC if that would be helpful with the conversation.
      3. Carly mentioned the hotel industry is a good place to investigate. Carly will reach out to Ben Feimer to share some other ideas. Will has hotel connections with Drury from high school. Tony Janssen has connections with McLaughlin hotel group as well.
5. Adjourn