**Prosperity Connection**

**External Committee Notes**

*November 21, 2024*

*11:00 a.m. – noon (CST)*

*Zoom*

*Agenda*

1. Call to Order – Attendance: Nikki Woelfel, Tom Boyle, Nikki Whetsell, Kathy Siddens, and Carol Harris

**See External Committee portal for detailed presentation**

1. Marketing and Communications
   1. Outreach stats – 116% increase in Facebook reach! Spanish FB Live led to a lot of views and interactions. Another popular FB Live was increasing credit score, most engaging in the moment. We do have several folks who typically join most of our “lives” in the moment. Increases in newsletter. October had two “helpful” blogs v. November was an informational story.
   2. Outcomes – Class pull-through rate Year-to-date is 41%, which is huge! YTD numbers are 722 for coaching and 349 credit reviews.
2. Recent Gifts/Contracts – See slide deck –
   1. Incarnate Word - $5000 for
   2. Commerce Bank - $2500
   3. County Credit Union - $100
   4. Parkside Financial - $10,000
   5. Earned Income
      1. CHOICES Program $3400
      2. Brown and Crouppen – CWE Next year
      3. Butler’s Pantry –

Institutional Advancement

* 1. Research/Applications
     1. Q4 Applications
        1. RGA – Requested $3000 for client celebration scholarship
        2. Deconness Foundation – Requested $20K GOS
        3. NISA Charitable Fund – invited back and will submit for $50K
        4. Centene Foundation
        5. Kathy and Robert met with Southern Bank at CRA speed dating event. No Volunteers yet but event sponsorship possibility.
        6. Nikki suggested Bank of Springfield as a place to look. Look at banks who are due for an exam. Tom Boyle has a connection with that bank and can help us start a relationship.
        7. Kathy and Nikki met with Enteprise Bank (Molly McKay and Jenny Merlo) They are interested in the Carrollton model to help with credit card declinations. They may want to fund a full-time or a part-time coach. Also looking at Busey Bank (Sandy Demun) for this model and possible coach sharing. (Nikki Woelfel has a personal connection with her).
        8. Likely banks will have to collect small business data. This is a great time to work on small business BHAGS. Banks will have a lot of interest here because of regulatory requirements. Kathy will work with Kevin Wilson.

1. Updates
   1. Equifax CWE was very successful!
   2. Building out a Spanish Facebook Page using Pablo and Veronica. They are getting training on how to use platforms needed to kick this off.
   3. Nikki and Julianna attended the Non-profit Storytelling Conference. Made amazing connections with offers of mentoring. High-quality speakers and valuable information to put into action.
   4. Process Flow Mapping – PC is working with Aaron Jaconis, to build out process flows for Grant and Earned Income work. We develop SOP’s, addressing bottlenecks, equipment needs, and reduce duplicative work. This will help us eliminate miscommunication and ambiguity. Also working with this on Partnerships.
2. What We Need Your Help With: (Nikki will send this out to all committee members)
   1. 2024 Year in Review – where have we excelled? Where can we improve?
   2. End of Year Giving – Not doing Giving Tuesday but focusing on End of Year. Making strategic phone calls, focusing on “5 friends” script to reach out to for a small end of year ask.
   3. Tom B mentioned that he notices we have shifted to regular streams of income vs. constantly looking for funding.
3. Adjourn