

EXTERNAL COMMITTEE

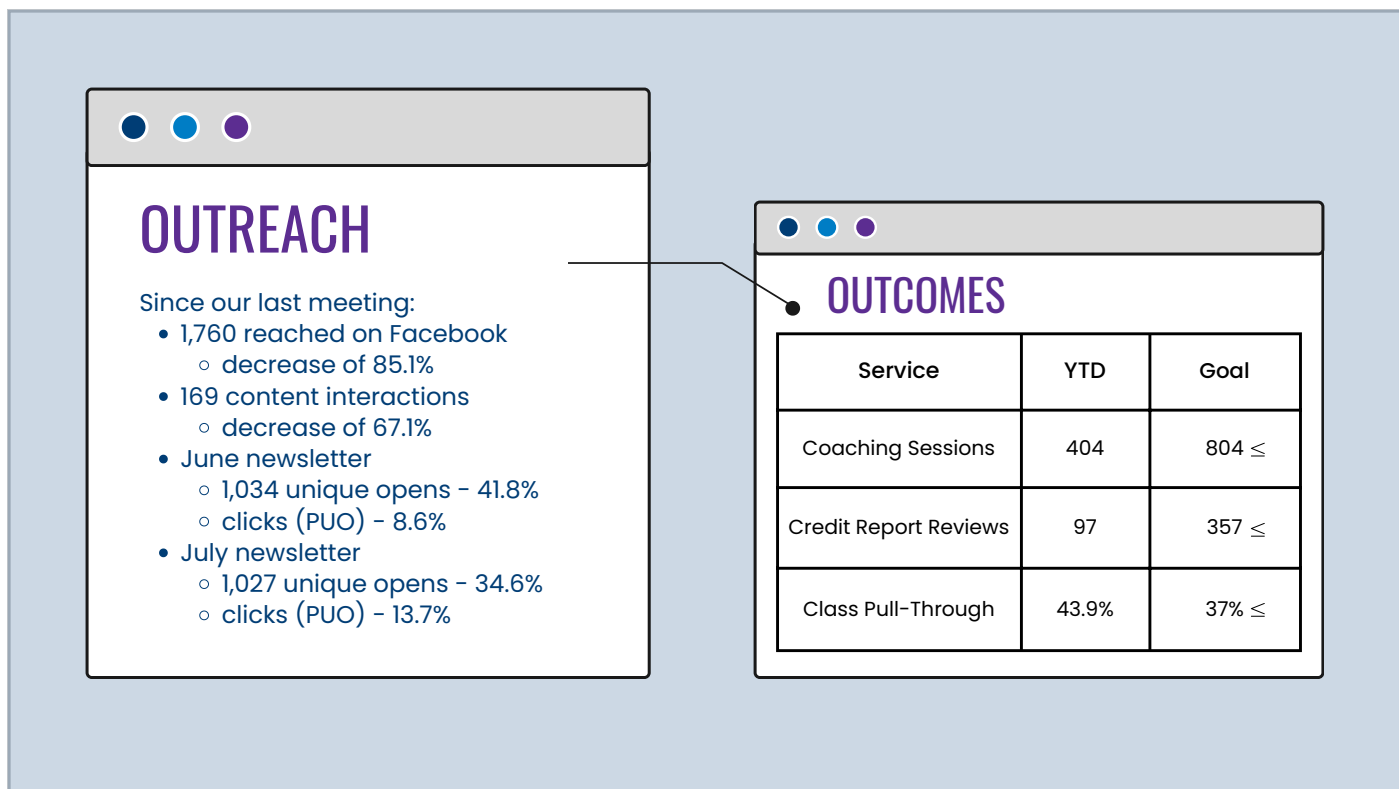
July 2025



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MARKETING & COMMUNICATIONS



OUTREACH:

We also gained 5 net followers during this time period.

Last time we met, we had high organic reach from our Spirit Week and Client Celebration posts. These types of things always do really well and boost our stats for that time period.

As a result, this timeframe's outreach numbers will show significant decrease.

Also, we are using Hubspot's 2024 "Best Times to Post" to research when our best time to post is. So far, following the different Hubspot trends has not boded well for us. We have one more section of timeframes to try out ("nonprofit"). My guess is that Loomly's suggested times are a better determinant for us.

Conversely, we were sending our newsletter out during Mailchimp's recommended times, but our opens were decreasing. For June, we sent the original at 7pm and the resend at 8pm. For July, we sent the original at 8pm and the resend at 7pm. Both performed comparatively and much better than Mailchimp's recommended times (which were 10pm).

OUTCOMES:

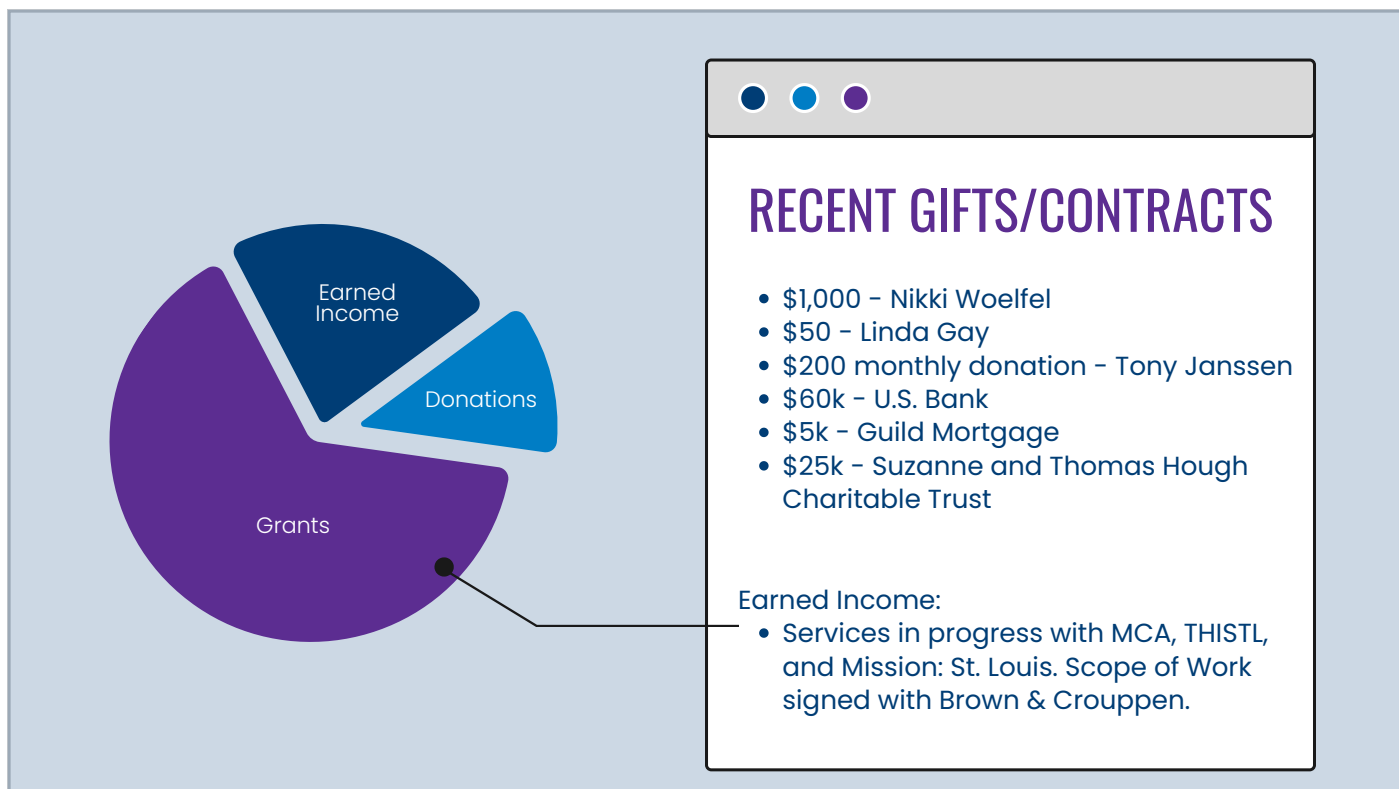
Don't have July class pull-through rates yet. Will report on that next time.

Credit report reviews will see a significant increase after next week's Credit Wellness Event at

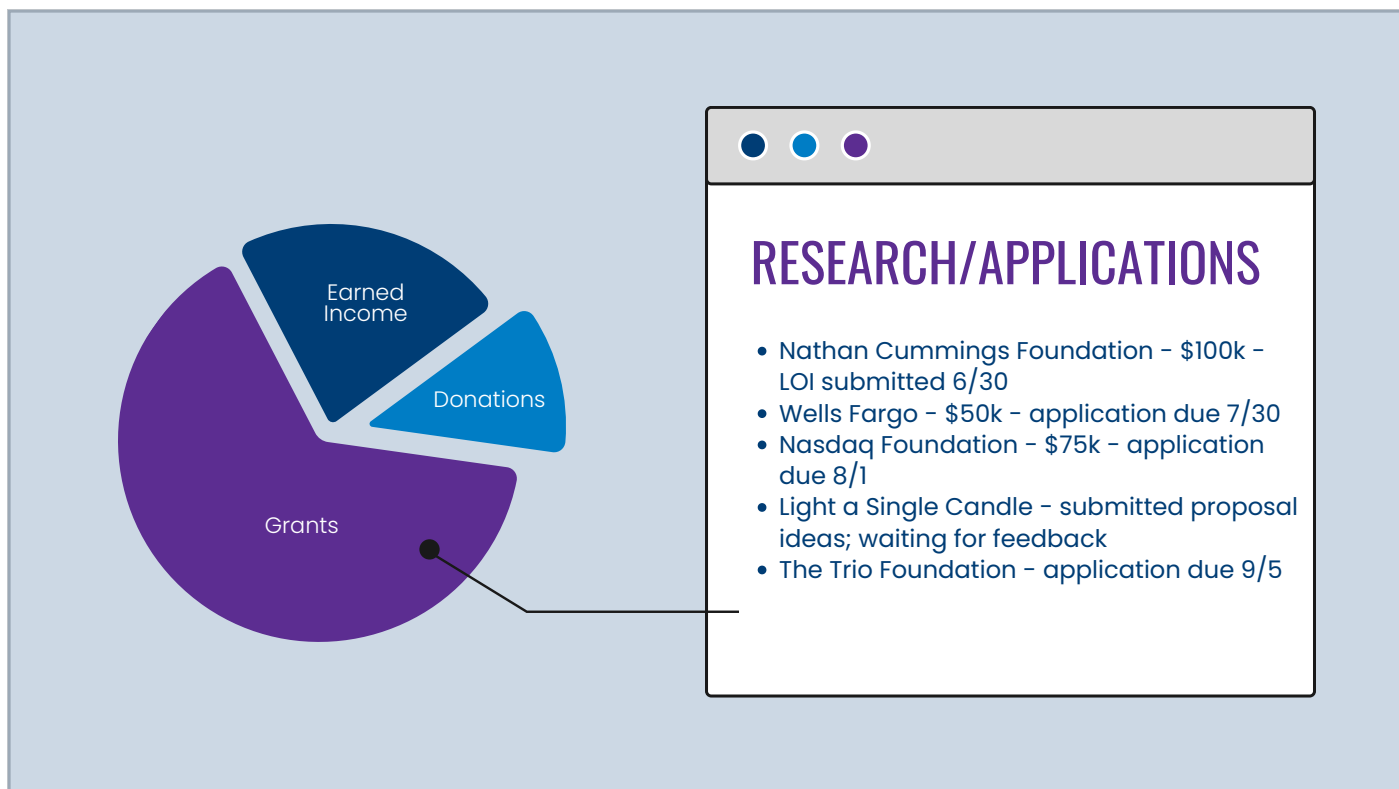
Equifax. Sara, Nikki, Kathy, and Greg have also recently discussed a marketing plan, specifically to increase credit report review numbers.



INSTITUTIONAL ADVANCEMENT



Generous \$1k donation from Nikki Woelfel! Tony Janssen started donating \$200 monthly in May, so we've gotten \$600 from him so far. We received the last payment of our 3-year grant from U.S. Bank - YAY!



In the last few months, we've applied for 5 NEW grants (Ameriprise, New Profit, Centene, Nathan Cummings, MMF). Our efforts continue to diversify our grant pool and bring in additional funding.

We're currently working on apps you see on the screen, in addition to a few "rolling" applications through banks.

We're also reaching out to someone from the Trio Foundation to start that application process - this is a required step as they do not accept "unsolicited" proposals.



UPDATES

BRAND NEW CPO

We're so excited to welcome our inaugural Chief Program Officer, Greg Laposa, to the team! Having spent most of his career in education and workforce development, Greg brings with him nearly 20 years of leadership experience to this role. Relying on past roles developing strategy, implementing programs, and building community partnerships, he is responsible for leading the overall program and service strategy for PC.

SPEAKING OPPORTUNITIES

Nikki recently moderated a discussion at the Federal Reserve Bank's "Conversations on Financial Well-being" event. At the same time, Ben Femier was in D.C. participating in a national, round-table discussion about the City Builds Credit initiatives. St. Louis is the "last man standing" and has been identified as a potential anchor institution for these initiatives.

NEW NEWSLETTER

After considering it for months and at the encouragement of our consultant, Megan, we are starting a second newsletter geared towards our funders, partners, and other practitioners in this space. This will serve as an opportunity for us to position ourselves as thought leaders in the financial education/economic mobility space. Our first edition will be ready to go in the first ½ of August - you'll be on the list! Please forward and share :)

As always, don't feel the need to read or address all of these.

WHAT WE NEED HELP WITH:

Continue signing up for training.

Who should we be following?

Who would be interested in serving as part of a 'sales' sub-committee?

Nikki and Kathy will cover this slide.