**Prosperity Connection**

**External Committee Notes**

*July 17, 2025*

*3:00 p.m. – 4:00 p.m (CST)*

*1310 Papin St. Suite 403*

*Microsoft Teams*

*Agenda*

1. Call to Order – Attendance: Nikki Whetsell, Carly Carmosino, Kathy Siddens, Greg Laposa, Kristen Polchinski, and Carol Harris
2. Introductions – New CPO, Greg Laposa, is in attendance.

**See External Committee portal for detailed presentation**

1. Marketing and Communications
   1. Outreach – gained 5 new followers…decrease in outreach due to spike as a result from previous month bump from client celebration.
   2. Revisiting email times recommended from mailchimp due to decrease in opens.
   3. New signups are automatically enrolled in newsletter
   4. Coaching sessions on track
   5. Will be seeing an increase in Credit Wellness Events due to upcoming CWE events later this month – brainstorming session took place to target CWE events, targeted ads, credit awareness month, tweak language on website, change how credit report review registration is made available on website. (Dedicated registration page connected to QR code on our buckslip, focus on core members on our email list (those who open)
   6. Asking members for help with companies who supply direct mail lists in STL for nonprofits.
2. Recent Gifts/Contracts – See slide deck –
   1. Please see the slide deck for the entire list.
      1. Nikki Woelfel
      2. Linda Gay (Carly’s mom)
      3. Tony Janssen
      4. US Bank
      5. Guild Mortgage
      6. Suzanne and Thomas Hough Charitable Trust
         1. In progress with MCA, Brown and Crouppen, Mission St. Louis, and
   2. Research/Applications
      1. Nathan Cummings Foundation - $100k
      2. Wells Fargo – $50K
      3. Nasdaq Foundation - $300-$400K
      4. Light a Single Candle – proposal submitted, awaiting feedback
      5. The Trio Foundation – application due 9/5
   3. UPDATES
      1. NEW CPO – Greg Laposa
      2. Nikki -moderated a discussion at the Federal Reserve Bank’s “Conversations on Financial Well-being” event.
      3. Ben Feimer participated in a national round-table discussion about the City Builds Credit initiatives. St. Louis could be identified as a potential anchor institution for these initiatives.
      4. New Newsletter geared towards funders, partners, and other practitioners in this space.
         1. Give space for feedback from partners
         2. Student loan focus
         3. Section of newsletter where we make a bold statement (hot-takes)
            1. Recent article cited that: Front line tellers should not be trained to be financial coaches…and then give the reasons why we believe this to NOT be a good thing and that PC is already doing this work.
         4. Nikki will send out a test email to Nikki Wo., Kristen, and Carly for feedback.
         5. Smaller email list to start and then encourage board members to forward to colleagues and encourage them to join the list and then forward on to more colleagues.
   4. What We Need Your Help With
      1. Who should PC be following?
      2. Best in class newsletters
      3. Linkedin people to follow
      4. Looking for 3-5 members from board committees to create a subcommittee to call/reach out to potential pipeline funders to see if we can move them along. Answer their questions, etc. (use Ben’s Feimer’s list)
      5. Thoughts on External Committee moving to 3 meetings per year, in person, and updates will be sent out on a regular basis. (March, July, and November meetings and conduct a survey of which is the best day of the week)
      6. Carol will create a survey to send to the board about meeting times, dates, cadence, etc.
   5. Adjourn @