**Prosperity Connection**

**External Committee Notes**

*September 18, 2025*

*11:00 a.m. – 12:00 a.m. (CST)*

*1310 Papin St. Suite 403*

*Microsoft Teams*

*Agenda*

1. Call to Order – Attendance: Nikki Whetsell, Carly Carmosino, Will Holleman, Kristen Polchinski, Tom Boyle, Kathy Siddens, Kristen Polchinski, and Carol Harris

\*see the External Committee Portal for the detailed presentation

1. Marketing and Communications
   1. Outreach – gained followers on Facebook and increased views, yet META is saying we have decreased. We are working to understand their data.
      1. August Newsletter – 1284 unique opens – 37.4%; clicks (PUO) 16.6%
      2. September Newsletter – down a little from August. Looking at other suggested time slots for posting.
   2. Outcomes – Coaching sessions are right on track, credit report reviews down, but brainstorming for solutions moving forward. Most Alliance members are not taking advantage of the complimentary services we offer as part of the membership. Class pull through is on track. DeSales is now taking advantage and paying as well.
   3. Question – what is the conversion rate from Credit Report Reviews to Coaching? Roughly 15%
2. Recent Gifts/Contracts – See slide deck –
   1. Tony Janssen, Enterprise Holdings Foundation, Equifax
   2. Earned Income – Services in progress with Small Business Empowerment Center, Dutchtown South (Alliance perk), and DeSales CDC (credit wellness event and class)
   3. Research/Applications -
      1. Invited to apply for the Dana Brown Charitable Trust grant!
      2. St. Louis Community Foundation
      3. Light a Single Candle
      4. BJC Healthcare
      5. Midland States Bank
      6. Robert Wood Johnson Foundation
      7. NASDAQ
   4. UPDATES
      1. Equifax Video Offer – All video services for our 2026 Client Celebration will be paid for by Equifax. This is about $15,000 in services.
      2. Speaking Opportunities – Prosperity Now conference – Fireside Chat with Ben Feimer, Veronica Guerrero, and Suzanne Hough (Carrollton)
      3. RFEC Opportunity – today, pitching a partnership between both of our organizations. PC proposing be the backbone of a combined entity.
      4. 2026 Planning – ELT is starting the planning process for 2026 and looking forward to taking advantage of our pipeline of partnership opportunities.
      5. The Annual Report on our website is AMAZING!
   5. What We Need Your Help With
      1. Continue to sign up for training
      2. Who should we be following?
      3. Who would be interested in serving part of a ‘sales’ sub-committee?
      4. With fewer meetings next year, what do you want to see in these updates? Either email Carol or bring ideas to the next meeting. Email by September 25th. (March, July, November meetings) Meetings should be 1.5 hours. Carol will send out a survey for best day/time for meetings.
      5. Carly will reach out to news channels to have a segment on TV morning shows.
      6. Podcast opportunities? Linkedin webinars?
   6. Ideas: use of AI to do data analysis? How to reach out to young black men, etc.
   7. Adjourn @