



**Prosperity Connection  
External Committee Notes**

*November 20, 2025*

*11:00 a.m. – 12:00 a.m. (CST)*

*1310 Papin St. Suite 403*

*Microsoft Teams*

*Agenda*

**I. Call to Order – Attendance:**

\*see the External Committee Portal for the detailed presentation

**II. Marketing and Communications**

- a. Salesforce Dashboard – Organizational Outcomes
- b. Outcomes - Coaching on track, Class pull through rate 41.9%, Credit report reviews are down this year (there is a plan in the works)
  - i. Reporting idea change proposals – change coaching sessions to unique coaching clients. (is the focus on new clients or just new people? Tom would like to see both metrics.) We can also add average number of coaching sessions per client. What is the “magic” number for a client to show improvement and move towards their goals?
  - ii. Add # of credit wellness events to the outcomes
  - iii. Add # of unique class attendees
  - iv. Kristen asked about metrics of CHOICES program being at the top of the referrals. Kristen would love to see the numbers increase for many of the partners, not only just US Bank.
  - v. There is a possibility of US Bank and PC taking over the homeownership classes and credit pulls for the Urban League. (carve out grant money from that hopefully)
- c. Salesforce Metrics – Meta is continuously changing the way they report the data
  - i. Recommendations – show Net follower growth, content interactions, link clicks, and viewers, not just views, and the top 3 posts of a recent period for analysis.
  - ii. Questions: what is our demographic? We currently don’t use Instagram because we don’t have capacity. Average age of PC client is mid-30’s and then higher. Do

we use TikTok? Short videos vs. pictures are more interesting and viewed. We do use LinkedIn as well.

- iii. Intern is rebuilding/repackaging our YouTube channel with a lot of shorts
  - iv. FinTok? This is a thing now.
  - v. Pinterest is another platform to use as a search engine where we could investigate getting our content out there and has a much longer “shelf life”.
  - vi. Kristen will share the US Bank PR toolkit.
- d. LinkedIn Metrics now available. – see the slide deck
- i. LinkedIn content engagement based on posts
  - ii. Recommendations include monitoring – new followers, unique members reached, engagement rate, clicks, and search appearances. Also to show top 3 posts of a recent period.
- e. Nikki shared a bit of information she brought back from her Nonprofit Storytelling conference last week.
- f. Email (Mailchimp) metrics – highly irregular metrics reporting. Nikki is planning to schedule a meeting with MC to clarify the way the metrics are reported.
- i. Recommendations: open rate %, unique click per open rate %, top performing content topic, and include data from new partner/funder newsletter
- g. Outreach -

III. Recent Gifts/Contracts – See slide deck for the detailed list

- a. Recommendations for reporting pipeline to shift to a table or spreadsheet separated by grant
- b. Research/Applications – see detailed list in slide deck
  - i. Recommendations for reporting pipeline to shift to a table or spreadsheet separated by grant, earned income, and individual donors. This will allow for additional information and context
  - ii. Orange, yellow, green: Green - we’ve got a solid connection/relationship, no additional assistance needed  
Yellow- we’ve got a loose connection but not a deep relationship, so an additional nudge or help from board/committee member could make a big difference

Orange - we're an organizational fit for this funding but have NO connection (or our connection has ghosted us lol) so help from the board/committees could be essential to help us establish a relationship

iii.

- IV. Meeting proposals for 2026 – in person meetings March, July, and November
  - a. Proposed day – third Thursdays @9:00 a.m.
  - b. UPDATES- Nikki will send a 1-2 page brief each month between meetings including:
    - i. Executive summary
    - ii. Fundraising snapshot- pipeline metrics, revenue to date vs budget
    - iii. Marketing/Comms Snapshot- 1 standout data point
    - iv. Brand and Influence (as needed)- speaking opportunities, leadership pieces,
- V. Highlights
  - a. Storytelling Conference
    - i. New Certifications – Ashlee Morgan is now HUD certified, Sasha Moore and Heather Schindewolf were just certified as Accredited Financial Counselors!
  - b. Giving Tuesday and End of Year Campaign are coming!
  - c. Two new possible committee members are currently being vetted
- VI. What We Need Your Help With
- VII. Adjourn @ 12:06