

# ACA Advancement Committee Meeting

Wednesday, September 30, 2020 – Zoom Call

## Opening

- I. Attendance
  - a. Present: Stephen Imholte, Sharon Ryan, Ann Dayton, Fr. Kevin Finnegan, Benjamin Jaffray, Quentin Moore, Suzie Colianni, Mike Halloran
  - b. Absent: Patty Stromen
  - c. Staff: Laura Wagner, Alishia Wright, Mary Ballariel, Beth Yellen
- II. Prayer: Laura Wagner
- III. Welcome: Stephen Imholte
- IV. Minutes approved by committee

## Committee Planning

- I. Meeting schedule for 2020-2021
  - a. Every other month, Tuesdays from noon to 1:30
    - i. November 17 is the next meeting
  - b. Mary to send out adjusted meeting invitations
- II. Committee Charge
  - a. Governance Committee went over every committee charter last week, next week Advancement Committee will receive their charter
- III. Committee work for the next phase of Advancement 2.0
  - a. Greater need for the board to be involved in solicitation?
  - b. What is the next phase with rolling out the recommendations from the audit?
    - i. How do we begin to build a better infrastructure for volunteer solicitors – key for the committee
    - ii. Board chair asking committees to put together work plan with goals for their committees
      1. There's a workplan form that Sharon has
        - a. Suzie will send it to Mary to send to all committees

## Advancement 2.0 System

- I. Intro
  - a. It is important the committee understands the workplan
    - i. Stephen to set aside time in every meeting for strategy discussion & how to support staff
- II. Documents from summer planning
  - a. Approach method
    - i. Do we know when the budget will be done?

1. It is close to being done. The church finance committee will be meeting within the next couple weeks and that will be the final hurdle to a final budget
- ii. Need to broaden the donor base with emphasis on the partner parishes
- b. Key Operations Calendar
  - i. January re-assess where we are at for planning the spring
  - ii. Concerns about the JPII Gala being considered for in-person
    1. If we are not going to be anywhere back to “normal” until the summer, why not shift the online event to a more ACA-wide event?
  - iii. Have we done ROIs for various tactics?
    1. Mail – finding if we are wasting time with folks that have not responded?
      - a. Casey’s advice is to not peel people off that have not given in a while.
      - b. Putting greater structure this year around how to do mail, more analysis on what is working and what is not.
      - c. How many mailings do we do in a year & average income from mailing?
        - i. 4 appeals per year
        - ii. Greatest income is Dec.
        - iii. Lowest income is spring
        - iv. Average is probably \$50k, however we need to do better analysis in the system
    2. How are we identifying people that are re-engaging?
  - iv. Can we do more personal appeal? Following up mail appeals with phone calls?
    1. Personal appeals have the best ROI, and they are the most time-consuming
    2. We use the Approach Method to determine how to best focus efforts & how to move people up/in
    3. The best way to broaden how many people we can reach on a personal level is to broaden how many people are involved in doing the personal appeals
  - v. Need to investigate how people are thanked, specifically who letters/emails are addressed to
  - vi. Twin Cities Journal published the top 75 paid CEO’s a few weeks ago. Many are in the burbs. How can we tap into the parishes in the suburbs to reach these people?
    1. Will touch on it in our strategic planning for today’s meeting
- c. Organizational Chart
  - i. Added staff:
    1. Beth Yellen – Events & Mailings
    2. Shane Carlson – Marketing & Communications
    3. Kathryn Luedtke – Database Management

- ii. With more people, the hope is to have more clarity and structure for board members wanting to be involved

## Strategic Discussion: Business Community Support

- I. Where are we, where do we want to go, how do we want to get there, what actions are we willing to take?
  - a. How do we build better support in the business community?
    - i. We currently have some business support, but it is not where it could be
      - 1. Current support:
        - a. Land O' Lakes (previously)
        - b. Sea Foam Sales
      - 2. Most of what we get are donors asking their companies
        - a. UBS
        - b. Cargill
        - c. Hormel
    - ii. Do we talk to donors about company matching gifts?
    - iii. Can we engage leaders in the organizations or key donors that work for these organizations?
    - iv. We need to define what we consider to be "business giving"
      - 1. Can include all forms (from business itself, through employee giving, etc.)
    - v. Need to have more information about employers in donor files
    - vi. Engage through volunteering
      - 1. Many businesses have a community impact department that focuses on having employees engage in the community, improving it through volunteering/service
      - 2. Can turn into employee giving & business giving
      - 3. Catholic Charities does this very well
      - 4. How do we start this?
        - a. Community Affairs/Community Relations
        - b. Most organizations have that information on their website
        - c. "We want to better understand your process & how we can help you meet your community impact goals"
    - vii. Are there funding initiatives that would be appealing to different groups of business leaders/businesses?
      - 1. Who is in our network/spouse's network & how do we expand that network?
        - a. Identify corporations that support education in MN
        - b. Who can we use in our network to get to those corporations?
        - c. Organizations that have stopped giving to education have started giving to North Minneapolis
          - i. Medtronic
          - ii. Best Buy
    - viii. Parishes??

1. How do we get to the more successful parishes that are in the 2<sup>nd</sup>/3<sup>rd</sup> ring of suburbs to get them involved with social justice/equity?
- II. Stephen to help draft document around this initiative (list of businesses)
    - a. Involve whole board in making connections
    - b. Specific actions to be done

## Tactical Implementation

- I. Mailing (Annual Solicitation Program)
  - a. Beth presented on the strategy for mail appeals this year
  - b. How was the delineation made between TLM on Moves Management and not on Moves Management?
    - i. Date of last gift, level of engagement with the Academy
  - c. Well done with systematizing mail
  - d. Are we looking at how letters are addressed/addressed properly?
    - i. As Beth has been going through appeals, she has been noting what changes to records need to be made so that things are addressed properly
    - ii. Emails can only go to one email address, not two. We are still trying to figure it out
  - e. Moving into a more systematic approach that creates consistency with donors
- II. Moves Management
  - a. Alishia presented on the strategy for Moves Management this year
  - b. Getting a footing on plans better
- III. Printed Pieces
  - a. Giving Pyramid
  - b. Case Statement
  - c. Commitment Form

## Closing

- I. Prayer: Stephen Imholte