

ACA Advancement Committee Meeting

Tuesday, November 17, 2020 – Zoom Call

Opening

- I. Attendance
 - a. Present: Fr. Kevin Finnegan, Sharon Ryan, Suzie Colianni, Stephen Imholte, Quentin Moore, Ben Jaffray, Ann Dayton
 - b. Absent: Mike Halloran
 - c. Staff: Patty Stromen, Laura Wagner, Alishia Wright
 - d. Guests: Casey Breen, Escale Advisors
- II. Prayer: Patty Stromen
- III. Welcome: Stephen Imholte
- IV. 9.30.2020 Minutes approved by committee

Campaign Progress Report

- I. Laura shared the campaign progress report, which is where we are at compared to our goal for the year. Thus far we have raised \$1.6 million of the \$5 million goal (32%) which is running roughly \$200,000 ahead of the same time in 2019.
 - a. The Academy pulls a list at the end of the year of who usually gives this time of year but has not yet.

Key Operations Calendar

- I. Key things coming up for Advancement this year:
 - a. President's Circle
 - i. 6 gatherings in October, 8 donors attended
 - ii. Gave us a platform to engage with people virtually
 - iii. Have future gatherings scheduled in February and June
 - b. Virtual Tours
 - c. Christmas Card Appeal
 - i. This year elevated how we segment the mailing list
 - ii. A card, letter, and reply device goes out
 - d. Thanksgiving Gift
 - i. Cookie Cart cookies with card given to higher level donors
 - e. OLG Secret Santa Shop
 - f. Give To The Max Day
 - i. JPPII and Ascension have pages
 - ii. St. Peter Claver Parish has a page, and we are working to see if we can help and have folks designate whether their gift is for the school or parish
 - g. Gift Drives – Christmas Gifts, food packages
 - i. Opportunities to directly gift scholars and their families are growing

- ii. Looking at how to build relationships with people/companies that get involved in this direct support so that they consider engaging in the mission in 2021
- II. Collateral developed this year
 - a. 1-page Case for Each School
 - i. Who are we and what are we about?
 - ii. What is the need we are addressing?
 - b. Giving Pyramid
 - i. A similar tool was used for the St. Peter Claver Campaign
 - ii. We are looking at how to incorporate it into our solicitation practice with greater effectiveness
 - c. Gift Intent Form
 - d. Discussion:
 - i. This is the best thing we have put out in a while
 - ii. Can we get a 1-pager on the Academy itself so that it is easier to speak on the Academy as a whole?
 - 1. Judy has worked on something for another event that we can send out for use.
 - iii. Is it possible to highlight the change overtime in cost per scholar?
 - 1. The \$9500 is general across the schools and includes Central Operations costs whereas previously it did not.
 - iv. We should compare our costs to Minneapolis Public Schools costs

Advancement Plan for Business Contributions

- I. Introducing the plan Stephen, Laura, and Casey worked on since the previous committee meeting.
 - a. Is the \$250k goal in addition to what is currently coming in from businesses and parishes?
 - i. Yes. This initiative is to build out new partnerships.
 - b. This plan shows great shift and hope for the future.
 - c. What would be the best way to roll this out to board, staff, and administration?
 - i. The plan needs to be part of the board materials and at the board meeting, directions need to be given as well as 1:1 conversation with board members moving forward.
- II. Stephen and Laura to work on some Academy talking points for going out and talking to potential donors regarding a gift.
- III. Have people been reaching out regarding Ascension and the recent state of North Minneapolis?
 - a. People that know us have, yes, however those that do not know about us have not. We do not have the name recognition to really see that yet.

Strategic Discussion: Peer-to-Peer System

- I. What are your thoughts on how we can make our peer-to-peer system better?
 - a. Moves Management
 - i. The system of taking a donor and moving them from one donor stage to another throughout the year.
 - ii. We have developed an internal structure and increased staffing to be able to support this.
 - iii. Typically used only for Major Gift, Leadership, and Transformational levels of donors.
 - iv. This year, staff capacity is roughly 150 donors. To grow our capacity, we need to bolster our volunteer involvement.
 1. It is about putting together teams of staff and volunteers to help move relationships along, keeping communication open.
 - b. Discussion:
 - i. Focus on what will help us now versus referencing what did or didn't work in the past.
 - ii. What is helpful is seeing it as systematic approach and receiving some coaching from staff, asking questions to help develop skills around moving donors through the stages.
 - iii. With prospecting, PPL has had success with board members/past board members being a "table host" for a virtual President's Circle. It works as a great way to get new donors involved.
 1. President's Virtual Coffees are a great way to connect. Board members hosting is a really good idea. Less intimidating being on a screen. Maybe have each board member host a virtual gathering with 6-8 people in it?
 2. Is there a way to role play it to help board members be successful with this format?
 - a. All anyone would really need to do is invite people to a virtual meeting and talk about why they are involved with the Academy before Staff takes over. The heavier lift is on the staff as they are the ones with the most information to share. Board members would just need to follow up after.
 - b. Patty is always willing to be part of these kinds of gatherings as it is not much of a lift for her.
 - c. Once the program is done, it may need to be tweaked, but it is not a big lift. We could do a dry-run with the entire board so they can see that the scariest part is inviting people.
 3. How do you overcome the ease of which people can just ignore the invitation?
 - a. At PPL, the board members were required to send 3 emails out to their group and follow up with them. It was an easy way for volunteers to stay engaged. They have had 135 individuals attend and over half have given a gift.

- b. Following up over email is a lot different than asking for money face-to-face.
 - c. With how the holidays are going and what people are saying, it can be an easy invitation to hear about an organization that is making a difference.
 - d. Simply inviting someone, even if they cannot make it, brings their affinity up for the Academy.
- iv. On the cultivation/communication piece, if we can get a bunch of people on a call, what happens after that? What are the expectations for a board member to be involved in one of these cultivation calls?
 - 1. That is a piece we would need to build out. The tactic is great, and we need to build a system around it so we know who is doing what piece.
 - 2. There needs to be a central place that the lists are sent to so that if there is someone on two lists, that can be documented and put out there as a duplicate and coordinate who is inviting them.
 - 3. There needs to be accountability with the board to do this and be in contact with staff about it.

Closing