Advancement Committee Meeting Minutes
Thursday, August 13, 2026
9:30 – 11:00 AM
Via Zoom

Present: Marjie Blevins; Brian Mullen; Gabrielle Rohde; Kristine Smyth

Staff: Andree Aronson; Matt Halley; Lacy Sietsema

Excused Absence: Joel Rainville; Sandy Vargas

The Accola Advancement Committee meeting convened on Thursday, August 13, 2026, at 9:34 a.m.

DEI Statement: Matt read the DEI Statement.

Meeting Intention: Led by Kris.

Minutes: The July 7 minutes were presented for approval. Hearing no changes or corrections, Gabi moved to approve and Kris seconded. All present members voted to approve the minutes.

Advancement Director's Remarks/Updates
Andree shared that recent advancement team restructuring, along with the new database and website, has created a stronger foundation for moving into more strategic donor engagement and grant work. Team roles have been clarified: Julie person will focus on grants and major donors, Lindsey will focus on volunteer management, Sam will lead marketing and communications, and Lacy will provide foundational support to help the advancement work run smoothly. This structure is reflected in the integrated fund development plan.

Key highlights included strong event participation, with 330 people attending the breakfast in person and 30 virtually. Grant revenue reached $172,000, more than double expectations, and the organization is now taking a more strategic approach to grants. New donors doubled last year, largely due to Metro Surge, 58 donors were recaptured, and donor renewals increased by 12%, suggesting stronger retention.

Partnership development is also becoming a major focus. The organization is tracking 30 active partnerships, 27 emerging partnerships, and one new partnership. Andree plans to meet with committee members to review the partnership list and identify potential connections.

There was a discussion about the organization's messaging and direction. It was noted that this broader conversation belongs within a strategic planning process involving the full Board, and the Executive Committee is interested in moving that process forward. Matt also emphasized that the committee can play an important role in identifying organizational partners to support individual programs and Accola's growth.

<u>26/27 Integrated Fund Development Plan:</u> The Integrated Fund Development Plan was reviewed. Andree explained the 5-year goals and the importance of increasing/retaining engagement. The next open house will be at Sarah's. This open house will include a tour and people will meet the new director.

Board Portal/New Website: Andree provided a brief overview of the Board Portal.

Other Business

Next Year's Goals for Committee: The committee reviewed its work plan for FY27. The importance of tracking Board connections and funding was emphasized, as was the need to show people the impact of leveraging networks.

Goals:

- Update the commitment form to be Advancement consistent (Board engagement, fundraising, and partnerships)
- Track BOD & BOD influenced connections: # of introductions, connections, impact from donors
- Committee expansion
- Events: all members attend Breakfast & fill table; attend 3 events throughout the year
- 100% participation in BOD giving and engagement

The committee discussed the importance of having a CSJ community member on the committee.

Adjourn: The committee adjourned at 10:22 a.m.

Respectfully Submitted,

Lacy Sietsema, Accola