

**CEO Development Committee**  
**Meeting Minutes**  
**July 25, 2024**

**Attendance:** Present: Fr. Dan Noll, Steve Angelucci, David Bowling, Mindy Towles, Kim Thompson

**Minutes** - Minutes from June meeting approved; David reviewed several call to action items - the CEOF Board approved the development plan which is a “living” document. Steve reported that he met with Bill and reviewed the branding and marketing plan. Bill supports the document as written. David encouraged Steve and Kim to move forward with the plan and forming the committee which would then have to be approved by the CEOF Board at the August meeting. Steve is working with someone local regarding professional development. David spoke with Jeff Ashley and told him that at this time we do not need their services. Mindy spoke of ways to combine donations and planned gifts for donors. David then did some research about adding a beneficiary to your will or life insurance policy. He said we need to add this opportunity to future solicitation letters. **ACTION:** He is sending the development committee a sample codicil.

**Part-Time Administrative Assistant** - Kim reported Brooks continues to complete tasks as assigned. She also is taking a leadership role in the planning for CEOF Equine Fund event.

**CEOF Equine Fund event** - Kim reported the planning is on track. Her personal motto is “generous hearts, deep pockets”. The Save the Dates will be mailed August 1st to the entire prospect list to “cast our net wide” **ACTION:** Kim asked the development committee to suggest names for the prospect list which includes attendees, donations, sponsorship, auction items, and volunteers. She asked for silent auction ideas as well.

**Donor Software** - Kim reported that Brooks, Dan and David joined her Monday for the demos from 2 companies - ELEO and Bloomerang. Kim highly recommends the purchase of a Bloomerang subscription. She feels it would increase productivity and make donor relationships stronger. If it offers additional add-ons at a reasonable cost (auction technology for a month or two rather than a calendar year), planned giving, wealth screening etc. that is an additional bonus. Bloomerang comes with an email component up to the number of records you subscribe to. The rep recommended Mailchimp or Constant Contact for the additional. After research Kim recommends holding off for now and changing the strategy of the number of emails sent due to the cost. Kim spoke to Robert Osbourne, of Stable Recovery, who has recently subscribed to Bloomerang. He spoke very highly of the product. **ACTION:** Kim will be speaking with Carrie Thayer Cardwell about the two programs and her experience with them. The Development Committee will revisit this at the August meeting and make a recommendation to the Finance Committee.

**Next Meeting Date:** August 12th at 10:30 a.m. via Zoom

