

Executive Director's Written Update for the
March 1, 2022 Virtual Board of Director Meeting
(Highlighting activities from January 10, 2022 through February 25, 2022)

• **Human Resource/Personnel Updates**

- In February, Leah shared she is going to be resigning from her role at ABC as of 3-10-22. She has worked with ABC in a variety of capacities for over 6 years and is going to be tremendously missed by everyone. She will be transitioning to operating her own back-end small business support company. To backfill for her role, I've signed a contract with an Accountant (Corinna Eiden/Definitive Solutions) to assist with bookkeeping/payroll for 10-15 hours per month, will be taking on some tasks myself and will be hiring a Communications Manager.
- We are in the early stages of planning for our next VISTA cycle. In the next two months staff will be having conversations with the current VISTA class to determine if anyone is interested in serving another year and then we will be starting the recruitment process.
- Leah has been working to introduce me to all of our HR vendors for payroll and benefits administration in preparation for transitioning these duties to my role following her last day.

• **Fundraising/Finance Updates**

- I've had the opportunity to connect with Jon Kubick from the GGBCF to learn more about our Agency Fund account and how that is operated.
- I've been working with Leah and Associated Bank and have been able to get access to our bank accounts and get our credit card switched over from Spencer's name to mine.
- I've been connected to Hawkins Ash CPA's via Leah and have our 2021 audit scheduled for 4-14-22 and am working on doing the pre-work for the audit with Corinna Eiden.
- I have met a couple donors/partners of ABC in my first two months including Lisa Jossart (CONNECT, Powered by American Family Insurance), Kate Hess (Unite Us), Amber Paluch (GGBCF/Basic Needs Giving Partnership) and Tom Erickson (BMO Harris Bank).
- I have future meetings scheduled with Jenny Rohan (Thrivent Financial), Heather Milbach (Schreiber Foods), Schmidt Family Foundation BOD and am working on others as I prioritize outstanding work related to the Sustaining Investment Campaign. See that spreadsheet for additional notes related to fundraising work.

• **Community Networking/Presentations and Marketing/Communications/PR**

- During my second week at ABC, I had the opportunity to connect with a representative of Wisconsin Public Radio who had reached out to learn more about our work. We discussed the opportunity for future partnership through media sponsorship (Reading Success Summit) and pitching content for a radio program (once the Promising Practices Reports are approved for public use).
- Have attended: UniteUs February Lunch Event (co-hosted by ABC), Wello's Well Being Summit, On Broadway's State of the Broadway District event, GGB Chamber's Future 15 event

• **Onboarding Accomplishments**

- Staff:
 - I've connected with all staff one-on-one during my first months to seek input/feedback and get to know them
 - Leah has been working to onboard me on numerous areas of the organization including finances, fundraising, office procedures, human resources and marketing and communication. She's also been working diligently to get me added as an administrator and trained on all of our key accounts with vendors and in different systems we use in day-to-day operations.
 - Ann and Christian have been spending time with me to help me learn and understand the backbone work of ABC and the structure of the Strive Together Network as well as dive into the details of our collective impact work/actions teams and CIS/EBDM work.
 - Mary has been very helpful in providing organization history and an overview of the types of data in our CIS
 - Spencer has been generous with his time and has met with me on a couple occasions to discuss questions related to the transition.
- Board of Directors:
 - I've focused my initial outreach to the BOD on 1x1 time with EC members and have had multiple meetings with Tony Nowak and Denis Hogan for onboarding and discussions on finances, budget and the sustaining investment campaign. I've also connected 1x1 with Dennis Buehler and Mohammed Bey so far and have been able to set up 1x1 time with Laurie Radke, Robyn Davis, Steve Murley, Missy Schmeling and Kim Desotell. I will continue setting up 1x1 time with the rest of the board over the next couple of months. Thank you all for your time and support in my onboarding and learning!

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- Office for Collective Impact:
 - I've had the opportunity to meet with Natalie Bomstad (Wello), Rebecca Fairman (Connections for Mental Wellness) and Lynn Coriano (POINT Poverty Initiative). We've established a recurring monthly meeting to discuss collective impact office things and have started discussing a donor recognition plan for the donors who made our collective impact office possible. We're also looking into a ribbon cutting/open house as the weather warms up. More to come on this soon!
- Strive Together/Wisconsin Partnership
 - I had 1x1 time with Daria Hall from Milwaukee Succeeds to get introduced to the Wisconsin Partnership and have attended my first Wisconsin Partnership Core Team monthly meeting which allowed me to get further introduced to Milwaukee Succeeds, Higher Expectations for Racine County and Building our Future (Kenosha County).
 - I have connected with Strive Together National and will be setting up a couple different introductory calls with them including with Jennifer Blatz (CEO). I have joined a Community of Practice for ED's that are 18-months or newer to their role and have been assigned an Executive Coach from Strive Together National who will assist with my education and onboarding during my first 6-12 months.
- Connected with Adam Hardy, ABC's first ED, to learn more about our history and early days