

January 6, 2026

Advancement Committee Meeting

Attendees: Lee, Tracy C, Christine Mills, Teri Kelley, Nina Stibbs, Laura Garfield, Stephanie Gularte, Melissa Joy

## Welcome and Purpose

The meeting was called to order with a review of the purpose: to discuss a **directional outlook for 2026 fundraising**, emphasizing phased planning rather than final decisions. Members were reminded that this conversation is intended to inform strategy development over time.

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## 2. Fundraising Status Update

Staff presented end-of-year fundraising results. A total of **\$89,640** was raised through **27 gifts**, with individual contributions ranging from **\$100 to \$25,000** and an average gift of **\$2,500**. Board members contributed **\$51,830**, with **\$35,810** from non-board donors, highlighting continued reliance on board giving.

Communications efforts included a November–December email drip campaign to segmented audiences, an informational video, one mailed appeal sent to **760 constituents**, social media outreach, and an updated fundraising webpage. January thank-you communications are planned.

Discussion highlighted interest in balancing mailed appeals with online platforms such as Donorbox, and whether alternative seasonal opportunities exist beyond year-end. **February, aligned with Women’s History Month**, was identified as a potential future focus.

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## 3. February 18 Denver Event – Fearless Investment Summit

The committee discussed the upcoming **February 18 pre-conference event in Denver**, held in conjunction with the Fearless Investment Summit. The event will feature keynote speaker **Cary Carbonaro**, a “Joyful Disruptors” panel, a wellness session, and a forward-looking industry discussion.

Nitrogen has offered free registration to the full Summit for attendees of WLA’s pre-conference. The group discussed outreach strategies, including requesting access to the Summit registration list, engaging FPA Denver and CFP networks, and ensuring men are included in invitations.

Action items included advisor outreach in Denver and sponsorship outreach, with WLA providing templates for sponsorship materials. Potential sponsors discussed included wholesalers and **TrueWest Consulting**, a female-owned firm identified by Melissa.

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#### **4. Events and Sponsorship Updates**

Upcoming in-person gatherings were reviewed:

- Dallas (January 27) – sponsored by First Trust
- Chicago (April 21) – sponsored by First Trust
- Boston (September 30) – sponsor needed

Webinar sponsorships for February and March were confirmed with **Invesco** and **RiverFront** at the **\$2,500 level**.

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#### **5. 2026 Fundraising Priorities and Roadmap**

The committee reviewed high-level fundraising priorities for 2026, including revenue diversification, donor engagement and retention, sponsorship growth, and capacity building. Emphasis was placed on communicating impact more effectively through data, storytelling, and enhanced reporting.

Ideas discussed included:

- Higher-quality annual reporting with clearer data points
- Direct links or QR codes to reports
- Use of historical testimonials, including a former mentee's journey

A planning roadmap was outlined with key touchpoints in January, April, July, and October.

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#### **6. Committee Discussion**

Committee members shared perspectives on growth opportunities, potential challenges, and the types of information and support needed as planning continues into spring.

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#### **7. Wrap-Up and Next Steps**

The meeting concluded with a recap of key themes, confirmation that **capacity building** will be a focus of the April discussion, and appreciation expressed for the committee's collaboration and flexibility.

## Advancement Committee Meeting Agenda

### Advancement Committee Meeting - Fundraising Outlook for 2026

**Date:** 1/6/26

**Time:** 11:00 am EST

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#### 1. Welcome (5 minutes)

- Purpose of today's conversation
  - Clarify: this is **directional**, not final (chicken or the egg plan)
  - Emphasize phased planning approach for the year
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#### 2. Where We Are Now (10 minutes)

- Results of EOY:
  - Total gifts: 27
  - Gifts ranging from \$100 to \$25,000
  - Average gift: \$2,500
  - **Total giving: \$89,640**
  - Board: \$51,830
  - Non Board: \$35,810
  - Communications:
    - Series of emails to 3 segmented audiences - both gratitude & request
    - WLA informational video
    - 1 mailer: Sent to 760 constituents
    - Updated web page
- Brief look at:
  - Current fundraising mix (board giving, individual giving, event & program sponsorships, etc.)
  - What's working well - beginning to tie program communications with fundraising requests

- Where we see opportunity or strain
    - Opportunities - build upon strategic partners - grants
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### **3. Hot Topic (10 minutes)**

- February 18 conference event in Denver: event sponsorships, industry invites.
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### **4. 2026 Fundraising: High-Level Priorities (15 minutes)**

- Revenue diversification
- Donor engagement & retention
- Sponsorship and partner growth
- Capacity and sustainability considerations

As we look ahead to 2026, our fundraising approach is designed to build momentum steadily throughout the year rather than relying on one or two high-pressure moments. The early focus is on establishing stability—particularly through sponsorships and leadership giving—while growing and engaging our Ambassador and donor community in meaningful ways. Storytelling and impact communication play a central role in warming and retaining supporters, so that when we reach year-end, donors are already connected, informed, and ready to invest. This phased approach allows us to be both strategic and flexible, with intentional check-in points throughout the year where this committee will help shape and refine the details.

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### **5. Fundraising Planning Roadmap for 2026 (5 minutes)**

- **January:** Plans kick-off after strategy session
  - **April:** Capacity-building discussion
  - **July:** Event sponsorship strategy & partner review
  - **October:** Year-end fundraising strategy and messaging
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### **6. Committee Input & Discussion (15 minutes)**

Prompting questions:

- From your perspective, where do you see the greatest opportunity in 2026?

- Any early concerns or watch-outs as we think about growth?
  - What support or information would be most helpful now as we kick things off AND as we move into spring planning?
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## **7. Wrap-Up & Next Steps (5 minutes)**

- Recap themes heard
- Confirm April discussion focus
- Thank committee for flexibility and partnership