



Executive Director's Report February 22, 2023

Updates & Discussion

LUMINARIA 2023- We have the location (Campbell House), the emcee (Angie Beavin), and the guest speaker (Fr. Corpora) secured. **Southern Glazer's Wine and Spirits** have agreed to sponsor again this year.

Julie K. and I met with the new event directors for the CH. They are going to pass along the price they charge Southern Glazer to us. There is still a corkage fee, but we are still coming out way ahead.

The award nominations are accepted through February 28th. The same selection committee is going to help us again this year. Those who nominated people last year have been contacted to update the applications. I have ordered the awards from Crown Trophy and they will be personalized once we know the winners. **Bill, I would like for you to call the winners again this year. This should take place mid-March.**

We have decided to try TOPS for photography this year. They give us 2 hours and will not charge us. I'll ask Brennan to cover another 1 ½ hours. Hopefully they will put Luminaria in their publication which would be helpful for marketing.

The Save the Dates have been mailed. We are in the process of putting the link to purchase tickets on our website. After much consideration and discussion I decided not to use the platform Julie K. has. The process will be the same as last year with sponsors buying tables and online ticket sales.

The tasting date is set with the CH and the planning committee. **Does anyone on the board have anything they would like for us to consider in regards to food?**

Sponsorships - We are very pleased with those that are returning and we are working on new sponsorships. Thank you, Bill, for opening the doors again for me. Dan, I'm hopeful the ones you talk with will be agreeable to commit again this year.

I asked Carol for topic suggestions for Fr. Corpora. She thought of having him zone in on how important Catholic schools are to our communities from "holler to suburban to urban". She encouraged him to pull in some of the research that has come out of the programs at ND. He is delightful to talk with and beside himself to go to Keeneland! He has submitted his flight receipts and Dan is working on reimbursement.

LC/JLC/PRINCIPALS/PASTORS - Since we missed having an October meeting I really feel we need something to re-engage our councils. **Could we host a happy hour type thing in February/March? I know the weather is dicey, but I thought of a few places we might try?**

SCHOOL CHOICE - From Andy Vandiver:

"Rep. Dan Fister joined as a bill sponsor on the Students First Amendment HB 174.

This puts us at 31 sponsors for the bill. This is not to be shared (even though it is public information), but we now have a majority of the House Education Committee as co-sponsors of HB 174. This means that if the bill is assigned to that committee, it is virtually guaranteed to pass if all of our supporters are present. This has never been the case on a school choice bill. "

EQUINE FUND - I have reached out to Fr. Chris to make a plan for meeting those in the industry and growing this fund in 2023. We will be meeting soon.

ESTATE PLANNING - I have asked Dan to add this to the Finance Committee agenda. I would like to have this in place in 2023. I have reached out to BGCF and they are happy to share the marketing materials they have with us.

GOLF TOURNEY- Friday, July 28th at Connemara - Announce at Luminaria 2023 event. We will also include the save the date in the Luminaria program.

GRANTS - I have submitted applications for the Keeneland Foundation, Gray Construction, and KU/LGE. We are awaiting word from Fifth Third Bank.

PROFESSIONAL GROUPS

Lexington Forward has been pulled under the umbrella of Commerce Lex. We have to join CL, but the good news is I was able to apply for a scholarship that covered most of the fee. I will cover the remainder. This will give me a year to decide if it is worth it as I believe the scholarship is a one time thing.

American Fundraising Professionals (AFP) I was invited to attend their Bluegrass chapter luncheon meeting last week. I found it very beneficial. The president who is Catholic and still donates to her grown children's school, St. John had not heard of CEOF. She owns her own marketing firm. We are having lunch later this week and I am going to "pick her brain". She seems very willing to help us, I think maybe on a volunteer basis. Fingers crossed!!!!!! I am going to join AFP. Last week's meeting:

It is likely that your major donors rely on guidance from a wealth advisor in many aspects of their financial life – accumulation and distribution of wealth, retirement and education planning, and even their charitable giving.

Karen McIntyre of Meridian Wealth Management will share why she makes charitable giving a regular part of her conversations with clients, and how financial planning and relationship development can impact fundraising for your organization.

Many major donors are using donor advised funds (DAFs) as a way to make their charitable giving more organized and tax efficient.

Scott Fitzpatrick of Blue Grass Community Foundation will provide an overview of DAFs – how they work, how to acknowledge grants received from them, and what they might reveal about your donors.

It was a very informative meeting!

MARKETING

Brennan Carpenter's services - Julia and I are working on the budget (waiting on the EOY financials to finalize). This will include marketing.

Video - I am working with **Three Stories Tall** to add testimony from someone or several people who have benefitted from our funds. We will show this at Luminaria 2023.

Constant Contact/Email - You received the first email I created. I then sent it on to the LC/JLC. I am preparing one for all of the email addresses I have. I will include this subscription in the marketing budget we are working on.

Social Media - Focused on CSW posts as well as nominations for the awards.

Masses - I would like to discuss speaking after masses and how we can best divide these among us, timeframe, and the process for contacting the parishes.

2023

April 13th - Luminaria 2023

July 28th - Golf event

October 21st - Focus Forward conference

November 28th - December 1st - Good Giving Challenge 2023