

ADVANCING TOGETHER | MONTHLY PROGRESS

Beyond these items listed, we are addressing a wide range of tasks and initiatives, supported by both internal team members and external partners, to ensure timely progress while making well-considered decisions for the long-term success of the organization.

OCTOBER PROGRESS

In October, we advanced our consolidation efforts, continuing a thorough review of all operational components across insurance, legal, and structural integration. Our momentum continues to grow through collaboration, with the collective efforts of the team driving both immediate achievements and long-term organizational stability.

- Accounting RFP distributed
- Legal RFP distributed
- HR RFP distributed
- Accounting firm determined + kick off meeting
- CEO surveys + stakeholder forums conducted
- Initial review of insurance benefit consolidation (health + supplemental)
- Other insurance quotes + consolidation (property + casualty, liability, EPLI, etc.)
- Investment committee kick off (BEDC committee)
- Identification of reserved + restricted funds per entity
- Pay + benefit analysis along with alignment with initial layout of individuals to roles
- Continued engagement with key community stakeholders
- Marketing + branding forums + data gathering

NOVEMBER TARGETS

Continuing to collaborate closely with our team and the board, we are leaning further into subcommittee + task force work in November, focusing on clear, tactical, and measurable goals. We will also continue progressing the CEO search, working to narrow the candidate pool and ensure our leadership choice aligns with the long-term vision. Internally, we are shifting from assessment to execution. As we move forward, we will continue to have intentional conversations with business partners and community stakeholders. Overall, November marks a meaningful transition from groundwork to tangible action, keeping us on track with our timeline and organizational objectives.

- Approve bylaws for 501(c)(3) and 501(c)(6) entities
- Legal RFP interviews + selection
- HR RFP selection + kick off meeting to progress staff efforts
- Accounting firm kick off meeting
- Establishment of Finance Committee
- CEO (firm has posted and made over 50 direct contacts, applications continue to come in)
- Finalize insurance benefit consolidation (health + supplemental) + prepare for enrollment
- Finalize insurance consolidation (property + casualty, liability, EPLI, etc.)
- Prepare + distribute dissolution documents to each entity
- Pay + benefit analysis completion; assessment of roles to pay
- Further brand development work ongoing
- Establish bank accounts (new EINs received)
- Continued engagement with key community stakeholders