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.

SEPTEMBER PROGRESS

In September, our goal was to maintain the momentum from the initiatives launched in August while advancing new, month-specific objectives. We successfully met—and in several areas exceeded—this goal through the following progress.

- Accounting RFP distributed
- Governance Committee creation
- Initial review of bylaws
- Kick off of key staff focused activities with staff involvement (i.e. employee handbook, benefits packages)
- Creation of draft team job descriptions
- Initial staff alignment of duties to new organizational structure (completed by staff)
- Evaluation of proposed team structure to additional needs of organization based on staff feedback
- Selection of Marketing firm: UpFrame Creative was selected to lead this effort
- Submit Articles of Incorporation
- Identify opportunities to engage key stakeholders for information sharing and to gather feedback
- Initial KPI review (key performance indicators) that will be monitored throughout combining efforts

OCTOBER TARGETS

In October, our efforts remain centered on the consolidation of entities, with a detailed examination of all operational components spanning insurance, legal, and structural integration. The CEO search remains an active priority, while we maintain strong relationships with community stakeholders and ensure staff remain engaged in essential tasks. Our success continues to be built through collaboration, with the team playing a central role in shaping the organization's growth and long-term stability.

- Finalize bylaws for 501(c)(3) and 501(c)(6) entities
- Legal RFP distributed
- HR RFP distributed
- Accounting firm determined + kick off meeting
- CEO
  - Team and community stakeholder surveys + 1:1s
  - Job description and benefits package determined
  - Recruitment kick-off
- Initial review of insurance benefit consolidation (health + supplemental)
- Other insurance quotes + consolidation (property + casualty, liability, EPLI, etc.)
- Investment committee kick off
- 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