



Consent Agenda

Vision, Mission, and Values

August Meeting Agenda

Board Dashboard: August 2025

Meeting Minutes

Board of Directors Meeting: June 2025

Report Items

Executive Committee Meeting Report
Development Committee Meeting Report
Governance Committee Meeting Report

Documents

Financial Reports
Strategic Plan Dashboard
Girls Inc. Strategic Plan from Schunk Moreland Strategies

VISION, MISSION, AND VALUES



Vision

We believe in the power of girls to thrive in a complex world by challenging norms and fostering self-confidence through mentorship and innovative programming.



Mission

To inspire all girls to be strong, smart, and bold.

Values



Equity

We commit to creating an equitable environment where every girl has the opportunity to succeed. Our programs are designed to ensure fair access, treatment, and outcomes for all, regardless of background.



Integrity

We prioritize impact over optics, ensuring our actions are honest, trustworthy, and respected. Our commitment to transparency guides us in building intentional, meaningful, sustainable change for every girl we serve. Integral to our integrity is a mission-focused service delivery that holds all staff, facilitators, and board members to a standard of excellence. This dedication ensures that our collective efforts are aligned with our core values, maintaining fidelity to our mission in every interaction and decision.



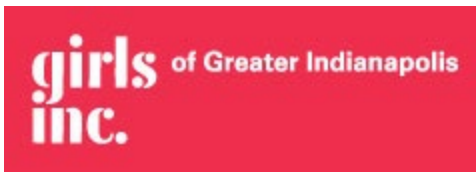
Innovation

We embrace a growth mindset, driving us to be innovative, visionary, and trailblazing in our efforts to empower girls. Our resilience fuels continual learning and adaptation, ensuring we are always at the forefront of transformative change.



Impact-Driven

We create meaningful and valued impact in our community and for the girls we serve by consistently implementing our programs with a commitment to service and developing data driven strategies that result in delivering reliable and transformative results.



Board of Directors Meeting Agenda
Thursday, August 21
5:15 PM-7:00 PM
At Girls Inc. of Greater Indianapolis

- | | |
|---|--------|
| 1. Call to Order (Ellen) | 5:15pm |
| 2. Consent Agenda (Ellen) | 5:15pm |
| 3. Review Financials (Suzie/Tammie) | 5:20pm |
| 4. Governance Update (Lisa) | 5:30pm |
| 5. Strategic Plan Core Values (Lindsay) | 5:45pm |
| 6. Programs Deep Dive (Michelle) | 6:00pm |
| 7. CEO Updates (Lindsay) | 6:30pm |
| 8. Action Items & Next Steps (Lindsay) | 6:40pm |
| 9. Executive Session (Ellen) | 6:50pm |
| 10. Adjournment | 7:00pm |

Upcoming Meetings and Events

Executive Committee: Thursday, September 18: 5:15 – 7:00 PM

Finance Committee: Monday, September 22: 9:00 AM

Development Committee: Friday, September 12: 2:30 – 4:00 PM

Governance Committee: Wednesday, September 10: 5:00 – 6:30 PM

Board Meeting: Thursday, October 16: 5:15 – 7:00 PM

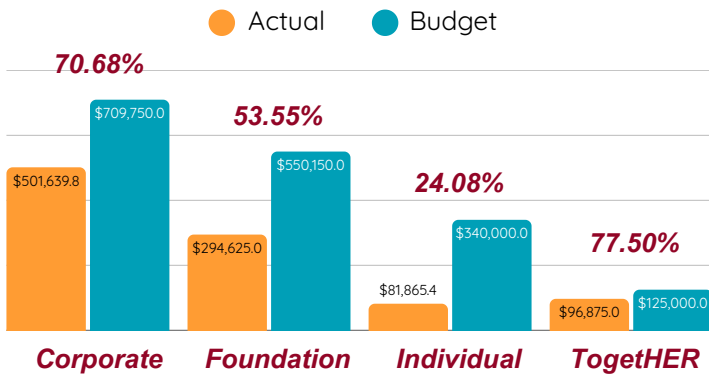
Together: Friday, September 26, 2025, 11 AM – 1 PM



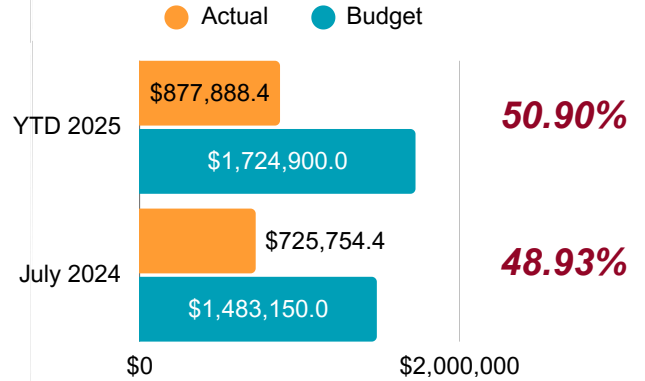
Board Dashboard: August 2025

DEVELOPMENT

Budget v Actual: Fundraising Buckets



Budget v Actual: FY



Active Prospect Pipeline
\$1,748,250

Active Asks Out
\$835,000

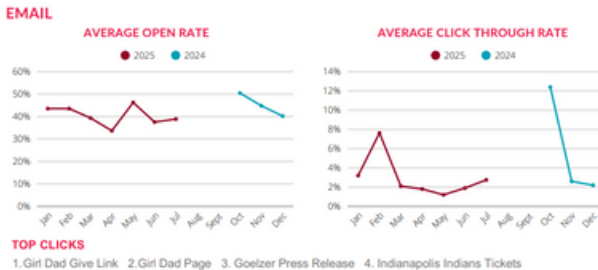
Gifts Released in 2025
\$608,925

MARKETING

2025 is determining baselines.



Email Open + Click Rate



Social Media Engagement

- LinkedIn: 3982 followers (+66 since June)
 - 1629 Average Post Reach
 - 45 Average Post Engagement
- Instagram: 3878 followers (+22 since June)
 - 214 Average Post Reach
 - 13 Average Post Engagement
- Facebook: 3108 followers (+95 since June)
 - 147 Average Post Reach
 - 10 Average Post Engagement

HUMAN RESOURCES



2025 Employee Retention Rate
YTD: 75%
Q2: 100%



- Open Positions**
- Program Facilitator (Permanent)
 - Individual Giving Specialist

BOARD ENGAGEMENT

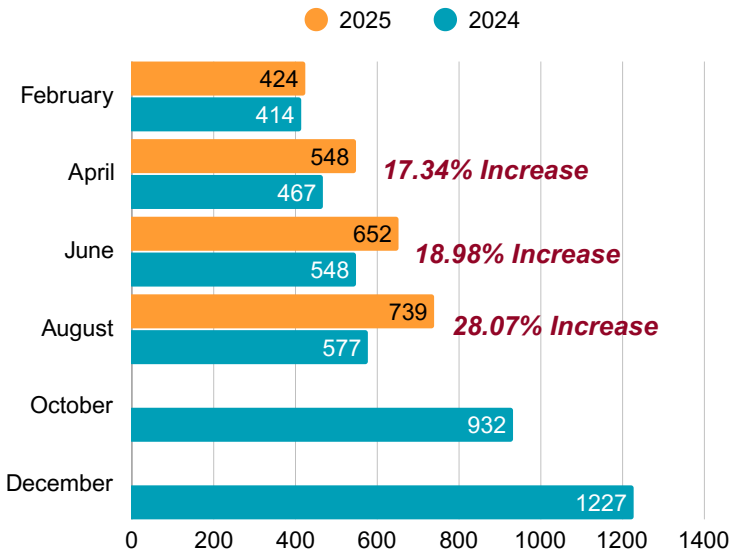
Please schedule 2025 1:1 with Lindsay.



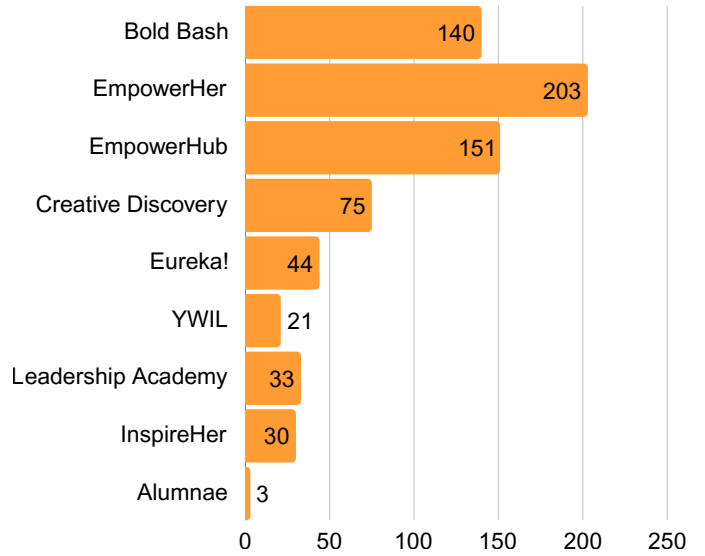
2025 Attendance Rate
69.61%

PROGRAMS

Girls Served: 2024 v 2025



2025 Girls Served by Program



2025 Programs



School-Based Partnership

14



Center-Based Partnerships

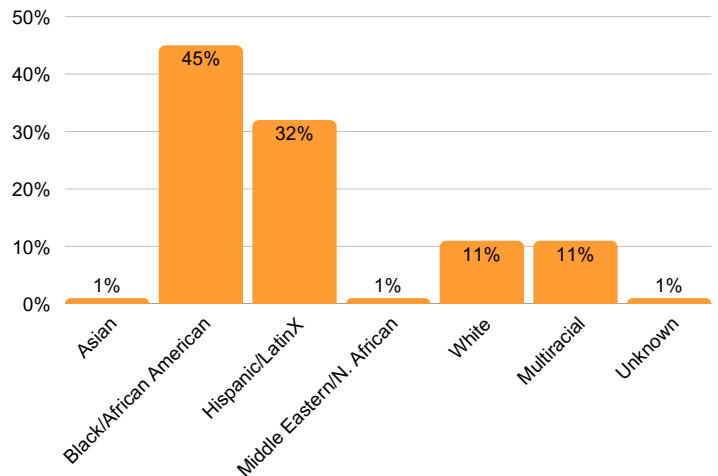
2



Participants in School Meal Program

62%

2025 Participant Demographics



VOLUNTEERS



Key Volunteer Partners:

- COX Automotive
- PNC
- Eli Lilly & Co.

Key Volunteer Opportunities:

- GIGI Outdoor Green Spaces
- Direct Mail Support
- Program Supply Organization
- Kit Creations
- Program Supply Donations

UPCOMING HIGHLIGHTS

Community Circle

Tuesday, Aug. 26: 5:30 PM-7 PM
GIGI

ASPIRE: GI HQ National Conference

Monday, Sept. 15-Friday, Sept. 19

ASPIRE Opening Reception

Monday, Sept. 15: 5 PM-8 PM
GIGI

TogetHER Luncheon

Friday, Sept. 26: 11 AM-1 PM
Commission Row

Board of Directors Meeting Agenda
Wednesday, June 18
5:15 PM-7:00 PM
At Girls Inc. of Greater Indianapolis



Board Members in Attendance

Ellen Butz, Chris Cotterill, Jennifer Grady, Carla Harris, Kristen Lampkin, Parul Malik, Mark Mosias, Jennifer Rufatto, Jeannie Infante, Evelyn Thompson

Board Members not in Attendance

Sandy Ashley-Jordan, Payton DuBose, Rico Francis, Erica Harris, Lisa Hawkins, Tosha Huddleston, Suzie Kovatch, Andrew Peñalva

Staff in Attendance

Lindsay Gramlich, Jade Stone, Bea DuBois

Official Meeting Minutes

Call to Order

Ellen Butz, Board Chair, called the meeting to order at 5:17 PM. There was no quorum for this meeting with voting. Lindsay Gramlich, President and CEO will email all board members on behalf of Ellen for approval of consent agenda and financials.

Committee Action Items

Parul Malik, Development Committee Chair, shared that the TogetHER event will need board engagement to promote and sell tickets. Everyone needs to reach out to their contacts to get engagement for the campaign. We have a total commitment of \$57,000 in sponsorship and tables, once everyone joins in, we can meet the \$125,000 goal set for this year. All details for TogetHER goes live on July 26th – please move forward and start selling tables now, the more sponsorship we can secure the more likely we are to reach our goal. Several key components are lined up for the event already, TogetHER will be a girl led event with GiGi interns assisting in different ways.

At this time GiGi is at 40% total revenue for the year, this is great as we tend to receive increased funds at the end of the year.

Please start having conversations with people who are interested in joining the board, there is no update currently. There is a timeline being used and potential people on the list as board candidates. Please share names of people that would be assets to the board – Lisa Hawkins, Governance Committee Chair, needs their contact information to follow up with possible candidate.

Board of Directors Meeting Agenda
Wednesday, June 18
5:15 PM-7:00 PM
At Girls Inc. of Greater Indianapolis



Chris Cotterill, Member at Large, put out a needs assessment, the 2025 Survey Results Board Matrix were included in the June board book. The overview of the board matrix shows areas of need to create a well-rounded board.

An update in operational governance, Lindsay added that Doneisha Posey will be working alongside GiGi, supported by a grant. Bringing Doneisha on board will help ensure that we align in best practices while remaining true to our mission and values.

Suzie Kovatch, Finance Committee Chair, shared that all Financial RFP meetings have been scheduled.

A success that has happened, GiGi was able to launch a new database for the team with Carla Montgomery's leadership.

It has been found that GiGi needs to create a cost model for schools as the current model was created by the previous executive administration. Changing the cost model to a district wide approach instead of working with singular schools. There is also a need to create an equity piece, the previous model needs to change to be equitable with our partners.

We need to connect with leaders of schools to see how we can make Girls Inc work in their environment.

A parent is underwriting the cost for GiGi to return to Herron – being an example of a way to connect with individual donors. Our new campaign of \$5,000 is a reasonable amount for single donors, \$2,500/semester for our program to be active in a school.

We are getting creative out of need to serve the GiGi girls, this is seen with the adding of Ted Talks, Advocacy Day, etc. We want to build a podcast for our Girls Inc family and will need to implement it in a way that most metrics can be met. This podcast will require the assistance of GiGi families and members to produce a quality product. AudioChuck (the most influential media company in the heart of the Midwest) is coming in with promises of assisting with building out this space for the girls and their families.

The goal is to work on core messaging with staff in July. We found in the aggregated data from both groups, board and staff to be aligned.

DeOndra Craig's role as Community Engagement Specialist creates the opportunity to increase community engagement, with this change GiGi was represented at five events last week.

We have proposals that need more insight to ensure we are engaging the right audience in the best way.

We will be sharing dates for upcoming events that the board can join in when possible.

Board of Directors Meeting Agenda
Wednesday, June 18
5:15 PM-7:00 PM
At Girls Inc. of Greater Indianapolis



We are seeing growth happen for our programs and funding was secured to go into Pike. We are seeing metrics go up with an increase in strategy and communications. GiGi has more content than we can post, placing priority on posts where people can resonate while sharing brand awareness and testimonials.

We are also ahead of last year with the Girl Dad campaign, foreseeing the Indianapolis Indians to renew as cultivation meetings are happening. We are at a total of \$10,887 with the match from Goetzler Investment Management.

People are interacting with social media, but we have not seen an increase in individual donors. Given this situation, GiGi has decided to hire an Individual Giving Specialist to support the development team. This role requires someone with sales experience and strong communication skills to engage potential donors, as we are currently not on track to meet our individual donation goals.

Registration for events is not equal to the amount of people showing up to events, high registration with a low turnout. We do have barriers for the pool of applicants we are able to reach. Scholarships have been made available with 34 families receiving half or full scholarships to go to camp this summer. Ten additional camper's fees are being covered for the last week of camp thanks to an individual donor stepping in to fill this need.

Strategic Plan

Kristen Schunk Moreland and her team joined us in the office for focus on the strategic plan. Kristen has been gracious in hosting two GiGi interns this summer.

Schunk Moreland Strategies with Jade and our team are working to get the best plan created and implemented. The Strategic Plan Snapshot document shared the Mid-Year update as dedicated to our strategy and statuses along with highlights.

Reflect, with Kristen- where does the board need to step in and what kind of commitments are necessary.

The board was separated into groups and takeaways were shared. Kristen Schunk Moreland and team are capturing responses and will share key takeaways.

Executive Session

Adjournment

The meeting was adjourned at 7:00 PM by Ellen Butz, Board Chair.

Girls Inc. of Greater Indianapolis

Executive Committee Meeting Minutes July 15, 2025

Attending: Ellen Butz, Chris Cotterill, Lindsay Gramlich, Carla Harris, Susie Kovatch, and Parul Malik.

The meeting was called to order at 5:16 pm.

Parul recapped a recent meeting at Cummins that secure 20K in funding. Discussion on committee members participation in development. Requested a break down on what is remaining to be raised. For example, using red, yellow, green, or hot, medium, and cold

Suzie suggested we change our investment policy to read consider changing our investment advisor every 5 years instead of we must do an RFP every 5 years. We are down to 4 finalists for our potential new investment advisor. We may need to revisit our asset allocation classes as well.

Lisa updated us on prospects for the board. Initial meetings should begin in August. Ellen will work on the 2026 board meeting schedule which will have 5 board meetings instead of 6.

Lindsay gave an update on personnel and staffing. She recapped all the events that have been going on surrounding the WNBA all-star week in Indy.

The meeting was adjourned at 6:32 p.m.



Development Committee

July 11, 2025

2:30 PM-4:00 PM

Committee Members

Parul Malik, Development Chair

~~Payton DuBose~~

~~Rico Francis~~

~~Mark Mosias~~

~~Andrew Peñalva~~

~~Leslie Salazar-Ad Hoc~~

Kristin Froehle- Ad Hoc

Staff

Lindsay Gramlich, President & CEO

~~Adam Clevenger, Interim Development Director~~

Jade Stone, Senior Director of Advancement

- **Call to Order:** 2:30 PM by Parul Malik
- **Updates:** 2:30 PM-2:45 PM
 - Financials
 - Outstanding & Upcoming Asks
 - Ask: Introductions

Jade and Lindsay overviewed the current fundraising progress for 2025. There is still a heavy emphasis needed on individual donor fundraising. The committee discussed potential reporting that would highlight how Board Members can support Jade and Lindsay in fundraising, with the team providing clear requests for support and progress metrics. As the Advancement Department continues to formalize its' processes, this will be a key opportunity for growth.

- **Girl Dad Update:** 2:45 PM-3:10 PM
 - Funds Raised
 - Remainder of Campaign Plan

Jade shared Girl Dad updates. With the matching support from Goelzer, the campaign was well underway. The remaining plans for the campaign included a staff challenge and continuing to push the campaign on social media channels and through email blasts. The Girl Dad campaign raised \$367.30 in 2024, not including the Indianapolis Indians' 2-year sponsorship (\$20,000 in 2024 and \$15,000 in 2025), so the progress has far exceeded last year's results. However, we must continue to push the campaign to increase individual donations.

- **TogetHER:** 3:10 PM-3:40 PM
 - Overview of Updates
 - Panel
 - Designs

- Sponsorships Sold & Outstanding Asks
- Next Steps

Jade overviewed TogetHER progress, with highlighting the need to continue selling tabling prior to individual ticket launch. Many tables had been sold, with continued opportunity to keep selling. While not all sponsorships have to be sold before individual tickets launch, it would be a great runway to ensure all seats are filled and we hit our \$125,000 goal. Parul requested an overview with a draft of a request for the board, to ensure all Board Members promote the event and possible sponsorship opportunities.

- **New Business, Asks, + Good of the Order: 3:40 PM-4:00 PM**

- GIGI 2025 Video
- Girls Inc. HQ: ASPIRE Conference in Indy, September 2025
- Update on Advancement Team
- *Ask:* Development Committee Engagement (calls, thank you cards, community event support)

Jade overviewed the theme of the new GIGI video, “the lifecycle of a Girls Inc. Indy girl”, where it will highlight our opportunity to serve girls ages 5-24 with age-appropriate programming. We also touched on the Girls Inc. HQ ASPIRE conference in Indy September 2025, with an opportunity to promote local businesses/things that make Indy unique. The end of the call focused on continuing to emphasize support for donor calls/thank you cards and community event support when available—all items strategically engage our network to ensure we build strong, supportive, and sustainable relationships.



of Greater Indianapolis

Girls Inc. of Greater Indianapolis Board of Directors

Governance Committee

REPORT

July 9, 2025
5:00 – 6:30pm

Committee Members

N	Lisa Hawkins, Chair	Y	Kristen Lampkin
Y	Chris Cotterill	Y	Jennifer Rufatto
Y	Erica Harris	Y	Lindsay Gramlich, President & CEO
Y	Tosha Huddleston	Y	Michelle Freeman, Chief Operating Officer
N	Sandy Jordan		

- Meeting called to order at 5:03PM
- **Strategic Items**

Board Member Engagement / Experience

- Update on Board interest in a new Buddy Program: We are still considering the buddy program however, the board shifted topics and it was not discussed. It has been requested that we add the topic of the Buddy Program to our next board meeting to determine if it's something we want to implement.
- **Action Item:** Survey board via an email poll to determine interest. *(Kristen)*

Bylaws, Policies and Procedures (Lindsay)

- Follow up on Standard Operating Procedures: Lindsay will be following up with Sandy to provide an update on her assigned action items.
- Doneisha Posey will be looking over GiGi documents, procedures, and providing legal expertise. She is an attorney and DEI professional that we can leverage her expertise.

Board Recruitment (Tosha)

See email from 7/5/2025

- The following areas have been identified; Strategic Corporate Connections, Employment/Labor Law, Prior board experience, Real Estate and the question was posed should we add Fundraising.
- Please send board referral information to Lisa Hawkins, by September 1st.

• **Other Business**

- It was decided that we will pause for now on an exploratory effort to consider an Advisory Committee. We can focus on other efforts and not rebuild at this time.
- Board Source Tool (waiting on Lilly)

Inspiring all girls to be strong, smart, and bold

- There has not been any feedback on the Board Calendar, it has been sent to Ellen.
(Jennifer)
- Meeting adjourned at 5:45pm (estimate)

Girls Inc. of Greater Indianapolis

Balance Sheet Prev Year Comparison

As of July 31, 2025

	TOTAL			
	AS OF JUL 31, 2025	AS OF JUL 31, 2024 (PY)	CHANGE	% CHANGE
ASSETS				
Current Assets				
Bank Accounts	\$199,014.53	\$130,510.90	\$68,503.63	52.49 %
Accounts Receivable	\$535,379.38	\$336,248.20	\$199,131.18	59.22 %
Other Current Assets				
1400 Prepaid Expenses	8,985.32	22,234.10	-13,248.78	-59.59 %
1500 Investments	620,777.15	480,819.57	139,957.58	29.11 %
1505 Endowment Investments	3,229,158.52	2,947,577.21	281,581.31	9.55 %
1506 Endowment Business Services A/C	0.00	55.59	-55.59	-100.00 %
Total 1505 Endowment Investments	3,229,158.52	2,947,632.80	281,525.72	9.55 %
1550 CICF Endowment Fund	17,264.29	15,603.33	1,660.96	10.64 %
Total Other Current Assets	\$3,876,185.28	\$3,466,289.80	\$409,895.48	11.83 %
Total Current Assets	\$4,610,579.19	\$3,933,048.90	\$677,530.29	17.23 %
Fixed Assets				
Other Assets	\$1,054,051.02	\$1,135,703.36	\$ -81,652.34	-7.19 %
	\$40,903.79	\$9,643.13	\$31,260.66	324.18 %
TOTAL ASSETS	\$5,705,534.00	\$5,078,395.39	\$627,138.61	12.35 %
LIABILITIES AND EQUITY				
Liabilities				
Current Liabilities				
Accounts Payable	\$11,316.02	\$33,839.66	\$ -22,523.64	-66.56 %
Credit Cards	\$3,889.35	\$4,600.45	\$ -711.10	-15.46 %
Other Current Liabilities	\$66,012.98	\$48,161.46	\$17,851.52	37.07 %
Total Current Liabilities	\$81,218.35	\$86,601.57	\$ -5,383.22	-6.22 %
Long-Term Liabilities	\$165,636.10	\$186,916.93	\$ -21,280.83	-11.39 %
Total Liabilities	\$246,854.45	\$273,518.50	\$ -26,664.05	-9.75 %
Equity				
3000 Unrestricted Net Assets	1,246,643.52	1,204,589.86	42,053.66	3.49 %
3100 Donor Restricted Net Assets	1,787,027.81	1,228,060.84	558,966.97	45.52 %
3200 Endowment	2,250,000.00	2,250,000.00	0.00	0.00 %
Net Revenue	175,008.22	122,226.19	52,782.03	43.18 %
Total Equity	\$5,458,679.55	\$4,804,876.89	\$653,802.66	13.61 %
TOTAL LIABILITIES AND EQUITY	\$5,705,534.00	\$5,078,395.39	\$627,138.61	12.35 %

Girls Inc. of Greater Indianapolis

Profit Loss Prev Year Comparison

January - July, 2025

	TOTAL			
	JAN - JUL, 2025	JAN - JUL, 2024 (PY)	CHANGE	% CHANGE
Revenue				
4000 Individual Donations	70,002.23	111,938.55	-41,936.32	-37.46 %
4010 Corporate Donations & Grants	381,197.09	375,915.89	5,281.20	1.40 %
4020 Foundation Donations & Grants	139,335.98	144,100.00	-4,764.02	-3.31 %
4035 Restricted for Future Years	178,350.00	93,300.00	85,050.00	91.16 %
4100 Program Services Income	56,105.02	47,135.90	8,969.12	19.03 %
4200 Rental Income	3,500.00	3,500.00	0.00	0.00 %
4300 Gift In Kind Income	3,925.00	17,167.25	-13,242.25	-77.14 %
4400 Event, Net	89,181.71	73,500.00	15,681.71	21.34 %
4500 Other Event Income	10,000.00	0.00	10,000.00	
4800 Interest Income	3,978.51	3,119.25	859.26	27.55 %
4900 Investment Interest & Dividends	52,426.98	43,870.24	8,556.74	19.50 %
4910 Investment Realized Gain/Loss	26,026.63	26,964.14	-937.51	-3.48 %
4920 Investment Unrealized Gain/Loss	214,371.15	224,064.89	-9,693.74	-4.33 %
Total Revenue	\$1,228,400.30	\$1,164,576.11	\$63,824.19	5.48 %
GROSS PROFIT	\$1,228,400.30	\$1,164,576.11	\$63,824.19	5.48 %
Expenditures				
5000 Salaries & Wages Expense	557,568.06	624,863.29	-67,295.23	-10.77 %
5100 Payroll Taxes Expense	41,972.67	46,552.81	-4,580.14	-9.84 %
5200 Benefits Expense	72,678.10	53,494.76	19,183.34	35.86 %
5300 Other Labor Expense	18,360.54	9,133.65	9,226.89	101.02 %
5400 Contractor Services Expense	98,884.55	67,325.15	31,559.40	46.88 %
5500 Professional Fees Expense	29,332.34	20,787.50	8,544.84	41.11 %
5600 Insurance Expense	13,880.20	14,513.14	-632.94	-4.36 %
5700 Occupancy Expense	39,298.54	23,371.79	15,926.75	68.15 %
5800 Equipment Expense	28,934.17	32,655.20	-3,721.03	-11.39 %
5900 Materials & Supplies Expense	22,284.24	22,151.71	132.53	0.60 %
6000 Public Relations Expense	9,142.05	11,561.00	-2,418.95	-20.92 %
6100 Printing & Mailing Expense	1,658.71	2,919.38	-1,260.67	-43.18 %
6200 Workforce Development Expenses	7,000.00	0.00	7,000.00	
6300 Travel Expense	23,814.83	16,359.67	7,455.16	45.57 %
6400 Conference Expense	687.12	185.00	502.12	271.42 %
6500 Membership & Subscription Exp	436.00	421.28	14.72	3.49 %
6600 National Dues Expense	10,350.00	7,000.00	3,350.00	47.86 %
6700 Scholarship Award	0.00	1,500.00	-1,500.00	-100.00 %
7000 Bank Charges Expense	562.54	498.36	64.18	12.88 %
7100 Credit Card Processing Exp	2,052.57	1,519.00	533.57	35.13 %
7200 Interest Expense	6,415.09	5,403.45	1,011.64	18.72 %
7300 Investment Fees Expense	17,412.99	16,054.84	1,358.15	8.46 %
7411 Gift In Kind Expense	3,925.00	17,167.25	-13,242.25	-77.14 %

Girls Inc. of Greater Indianapolis

Profit Loss Prev Year Comparison

January - July, 2025

	TOTAL			
	JAN - JUL, 2025	JAN - JUL, 2024 (PY)	CHANGE	% CHANGE
8000 Depreciation Expense	46,741.77	46,911.69	-169.92	-0.36 %
Total Expenditures	\$1,053,392.08	\$1,042,349.92	\$11,042.16	1.06 %
NET OPERATING REVENUE	\$175,008.22	\$122,226.19	\$52,782.03	43.18 %
NET REVENUE	\$175,008.22	\$122,226.19	\$52,782.03	43.18 %

Girls Incorporated of Greater Indianapolis
Budget vs. Actuals
January - July, 2025

	Total			
	Actual	Budget	over Budget	% of Budget
Revenue				
4000 Individual Donations	70,002.23	340,000.00	-269,997.77	20.59%
4010 Corporate Donations & Grants	381,197.09	709,750.00	-328,552.91	53.71%
4020 Foundation Donations & Grants	139,335.98	550,150.00	-410,814.02	25.33%
4035 Restricted for Future Years	178,350.00	0.00	178,350.00	0.00%
4100 Program Services Income	56,105.02	73,820.00	-17,714.98	76.00%
4200 Rental Income	3,500.00	6,000.00	-2,500.00	58.33%
4300 Gift In Kind Income	3,925.00	0.00	3,925.00	0.00%
4400 Event, Net	89,181.71	125,000.00	-35,818.29	71.35%
4800 Interest Income	3,978.51	4,500.00	-521.49	88.41%
Total Revenue	\$ 925,575.54	\$ 1,809,220.00	-\$ 883,644.46	51.16%
Gross Profit	\$ 925,575.54	\$ 1,809,220.00	-\$ 883,644.46	51.16%
Expenditures				
5000 Salaries & Wages Expense	557,568.06	1,144,800.00	-587,231.94	48.70%
5100 Payroll Taxes Expense	41,972.67	87,577.21	-45,604.54	47.93%
5200 Benefits Expense	72,678.10	145,660.75	-72,982.65	49.90%
5300 Other Labor Expense	18,360.54	32,500.00	-14,139.46	56.49%
5400 Contractor Services Expense	98,884.55	183,100.00	-84,215.45	54.01%
5500 Professional Fees Expense	29,332.34	28,000.00	1,332.34	104.76%
5600 Insurance Expense	13,880.20	27,500.00	-13,619.80	50.47%
5700 Occupancy Expense	39,298.54	53,500.00	-14,201.46	73.46%
5800 Equipment Expense	28,934.17	66,573.41	-37,639.24	43.46%
5900 Materials & Supplies Expense	22,284.24	41,900.00	-19,615.76	53.18%
6000 Public Relations Expense	9,142.05	25,400.00	-16,257.95	35.99%
6100 Printing & Mailing Expense	1,658.71	10,625.00	-8,966.29	15.61%
6200 Workforce Development Expenses	7,000.00	30,000.00	-23,000.00	23.33%
6300 Travel Expense	23,814.83	31,450.00	-7,635.17	75.72%
6400 Conference Expense	687.12	26,500.00	-25,812.88	2.59%
6500 Membership & Subscription Exp	436.00	400.00	36.00	109.00%
6600 National Dues Expense	10,350.00	12,000.00	-1,650.00	86.25%
7000 Bank Charges Expense	562.54	1,700.00	-1,137.46	33.09%
7100 Credit Card Processing Exp	2,052.57	2,500.00	-447.43	82.10%
7200 Interest Expense	6,415.09	7,600.00	-1,184.91	84.41%
7300 Investment Fees Expense	17,412.99	24,000.00	-6,587.01	72.55%
7411 Gift In Kind Expense	3,925.00	0.00	3,925.00	0.00%
8000 Depreciation Expense	46,741.77	85,000.00	-38,258.23	54.99%
Total Expenditures	\$ 1,053,392.08	\$ 2,068,286.37	-\$ 1,014,894.29	50.93%
Net Revenue	-\$ 127,816.54	-\$ 259,066.37	\$ 131,249.83	49.34%
 Gifts to be Released from Restriction for use in 2025		608,925.00		
Permanent Endowment Account Draw		-		
Net Operating Gain/Loss		349,858.63		

January 1, 2025 - December 31, 2025

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Cash Balance Forward - Checking/Sweep Acct.	415,300.00	370,465.00	328,555.00	239,250.00	225,650.00	158,900.00	172,600.00	199,000.00	184,000.00	159,500.00	265,000.00	331,500.00	
Transfers to/from Endowment	-	-	-										
Transfers to/from Investments	-	-	-										
Income													
Contributed Income, Individuals	16,530.00	4,800.00	4,375.00	14,000.00	11,100.00	10,000.00	11,300.00	10,000.00	20,000.00	25,000.00	20,000.00	34,500.00	181,605.00
Contributed Income, Corporations	56,000.00	19,250.00	21,000.00	71,500.00	70,700.00	46,000.00	160,000.00	5,000.00	70,000.00	115,000.00	181,000.00	8,500.00	823,950.00
Contributed Income, Foundations	5,835.00	37,700.00	5,000.00	10,000.00	12,500.00	106,000.00	-	100,000.00	35,000.00	100,000.00	25,000.00	25,000.00	462,035.00
Earned Income	2,500.00	6,340.00	6,575.00	10,000.00	10,500.00	26,000.00	3,800.00	500.00	500.00	15,500.00	500.00	500.00	83,215.00
TOTAL INCOME	80,865.00	68,090.00	36,950.00	105,500.00	104,800.00	188,000.00	175,100.00	115,500.00	125,500.00	255,500.00	226,500.00	68,500.00	1,550,805.00
Expenses													
General Operating Expenses	125,700.00	110,000.00	130,300.00	119,100.00	171,550.00	174,300.00	148,700.00	130,500.00	150,000.00	150,000.00	160,000.00	130,000.00	1,700,150.00
TOTAL EXPENSES	125,700.00	110,000.00	126,255.00	119,100.00	171,550.00	174,300.00	148,700.00	130,500.00	150,000.00	150,000.00	160,000.00	130,000.00	1,700,150.00
SURPLUS/DEFICIT FOR MONTH	(44,835.00)	(41,910.00)	(89,305.00)	(13,600.00)	(66,750.00)	13,700.00	26,400.00	(15,000.00)	(24,500.00)	105,500.00	66,500.00	(61,500.00)	(149,345.00)
CASH BALANCE (DEFICIT)	370,465.00	328,555.00	239,250.00	225,650.00	158,900.00	172,600.00	199,000.00	184,000.00	159,500.00	265,000.00	331,500.00	270,000.00	
Diamond Capital Investments	589,748.38	599,902.76	587,671.36	586,709.42	600,655.94	614,714.09	620,777.15						
UBS Endowment Account	2,984,778.52	3,057,993.31	2,967,332.54	2,950,448.09	3,072,491.03	3,198,055.80	3,229,158.52						



2025 Strategic Plan Dashboard

Strategic Plan Snapshot: Mid-Year Update

Strategic Plan Snapshot | August 2025

Goal 1: Dynamic Programming

Strategy	Status	Strategy Highlights
Deliver Dynamic Programming	● Green	<ul style="list-style-type: none">Redesigned programs to include capstone projects and consistent survey cycles
Foster an Equitable Experience for All Girls	● Green	<ul style="list-style-type: none">Implemented consistent program calendar and expanded opportunities beyond single program focus (i.e. internships)Provided an increased amount of scholarships for participants to eliminate financial barriers to participation
Recruit and Retain a Mission-Driven Staff	● Yellow	<ul style="list-style-type: none">Ensured job titles and descriptions are updated in alignment with org. structure and audition-style hiring for facilitatorsImplementing KPIs for all rolesSlowed hiring due to ensuring correct fitLaunched a new database (Paylocity) to support professional development, staff records, annual reviews, hiring, etc.
Strategically Fundraise and Allocate Resources	● Yellow	<ul style="list-style-type: none">Created cost models and strengthening partnerships with schools and community sitesDeveloping menu of support for programmatic-focused opportunities to donate, with support from BoardContinuously evaluating additional program-focused funding opportunities



2025 Strategic Plan Dashboard

Strategic Plan Snapshot: Mid-Year Update

Strategic Plan Snapshot | August 2025

Goal 2: Uplifting Girls' Voices

Strategy	Status	Strategy Highlights
Girls Lift Their Own Voices	● Green	<ul style="list-style-type: none">• Intentional partnerships (DVPN, Half the Story, GI HQ Teen Advocacy Council) and experiences (Advocacy Day, TED Talks, STEM Showcase, Small Business Fair) to uplift girls' voices, with continued focus for 2025-2026 programming• Hosting a "town hall" night for girls and their families to provide a platform for feedback
Use Our Voice to Uplift Girls	● Green	<ul style="list-style-type: none">• Developed organizational core messaging, now translating into communications
Become Strong Girl Advocates	● Green	<ul style="list-style-type: none">• Participating in community events that align with allies in all spaces• Utilizing our platform to uplift our girls (blog posts, testimonials, speeches, etc.)• Slowed progress in promoting advocacy due to environment, but effectively navigating within our space



2025 Strategic Plan Dashboard

Strategic Plan Snapshot: Mid-Year Update

Strategic Plan Snapshot | August 2025

Goal 3: Growth

Strategy	Status	Strategy Highlights
Improve External Messaging	● Green	<ul style="list-style-type: none">• Developed a consistent and strategic presence via social media, email blasts, direct mail, and website updates• Establishing a strategic relationship management system through the building Adv. Team• Increasing attendance at community events, with continued opportunities provided to girls (i.e. BUTTER art festival, City League games, etc.)
Recruit Participants	● Yellow	<ul style="list-style-type: none">• Fully integrated participant/family database for consistent outreach• Recruitment numbers are not translating into attending, for events and programs
Explore Expansion	● Green	<ul style="list-style-type: none">• Systemized the feasibility study to prioritize school partnerships• Solidified programming model for replication• Finalized an internal readiness assessment
Fundraising & Sustainable Opportunities for Growth	● Yellow	<ul style="list-style-type: none">• Launched individual giving campaigns through intentional communication strategies• Created Adv. Team to focus on individual giving, expanding corporate relationships, and increasing grant applications• Unsteady landscape for funding due to current environment

Girls Inc. Strategic Plan

Mid-Year Check In

June 18, 2025

Where do you see the most momentum right now?

- Leadership team
- Staff is being moved along now – doing the work necessary
- Ability to pivot in development staff – couldn't have happened before
- Internal processes have been overhauled
- Focusing on the core work
- Focused on our programming - hitting on all cylinders now
- Give people tangible items to donate to
- Marketing and comms in general

- Outreach board participation- anytime Lindsey wants to connect help is given. Fundraisers, needing connections board is always wanting to help

- Consultants are strong, going through the talent struggle was hard now came out with stronger partners They bring help to the table
- Community partnerships every meeting a new partnership. Lindsey and team finding new connections that have outcomes for us
- ^Together- a program with much higher level and most not coming out of Girls Inc pockets
- The number of girls we serve is up
- Lindsey has done a great job with board outreach and which board members have the resources to give and commitment being shown differently based on individuals' connections.
- Marketing and online presence

Where does the Board need to focus to keep the strategy moving forward?

- Individual giving
- Funding our growth
- Need a more stable financial model
- Fundraising
- Community partnerships
- Talent pipeline

- Our ability to ask is becoming easier because of what we are doing
- Development Committee- Our plans to increase donors have not come to fruition. pivoting is necessary Lindsey mentioned that, and we need to see some momentum there.
- Need to have more donations, sponsorships tapping more into board members network (board members can do better as whole to commit to fundraise) Consistently sharing programs, more posting with networks
- Communication- If your company can't give at least say you tried (Shows commitment)
- Share posts and events to inspire
- Staff could help with gaps, board members could help mentor staff

Additional Comments

- Ellen Butz- We're not asking you to go out there and raise the money yourself give the name for an email introduction
- Our ability to ask is becoming easier because of what we are doing, Things online we can post so much easier keep the momentum going.

One thing you're going to help with:

- Evelyn Thomposon- Fundraising, send out to network, help with in kind
- Jeannie Infante- Fundraising
- Ellen- Hammering on the board, better connections with her network for the organization, individual messages
- Chris C- Help with Girl Dad campaign help that with getting more donations
- Mark- Marketing, niche expertise, leveraged better to advocate for girls inc
- Jennifer R- Girl dad campaign on LinkedIn
- Jennifer G-Pledge and two rounds of thank you letters
- Parul- Grants from Cummins, accelerate grants
- Kristen- Push girls and secure her organizations table
- Carla- Reaching out to program network

One word that described your outlook for the second half of the year:

- Evelyn- Hungry
- Jeannie- hopeful
- Ellen- Hopeful
- Chris -expectant
- Mark -Hussle
- Lindsey- Teamwork

- Jennifer-Hopeful

- Parul- present
- Kristen- focus
- Carla- Commitment