



**Arbor Circle Board Meeting**  
**Thursday, March 14, 2024 Noon – 1:30 PM**  
1560 Leonard St. NE; Grand Rapids, MI 49505  
Microsoft Teams option  
[Click here to join the meeting](#)

- |   |        |
|---|--------|
| A. Call to Order, Welcome, and Announcements – Nettleton  | 1 min  |
| B. Approval of Agenda – Nettleton   | 1 min  |
| C. Approval of Board Meeting Minutes of February 8, 2024 – Nettleton  | 1 min  |
| D. Review and Approval of January 2024 Financial Statements – Brill   | 10 min |
| E. Program Presentation – Sheppard/Chang<br>Early Childhood & Healthy Families Program  | 20 min |
| F. Performance Improvement Report – Walton<br>FY2023 Service Outcomes   | 20 min |
| G. Committee Reports  |        |
| 1. Exec. and Finance – Nettleton  | 2 min  |
| 2. Governance – Sieplinga<br>Board Profile Report   | 10 min |
| 3. Development – Freeman<br>Presentation – Making Connections – Greenfield  | 15 min |
| 4. Community Engagement and Events – Thomas/Burden Hill<br>Spring Forward, May 22, 2024, 6-8pm  | 5 min  |
| H. Other Business   | 1 min  |
| I. Next Meeting: May 9, 2024, 12-1:30pm; 1560 Leonard NE <i>(No Board Meeting in April)</i><br>Equity and Inclusion Training – in person attendance preferred |        |
| J. Meeting Feedback and Adjournment – Nettleton   |        |



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**Board Members Present via Teams:** Mandice McAllister, Elliot Talen, Gwendolyn Thomas, B. Donta Truss.

**Board Members Present in Person:** Patty Farrell-Cole, Judy Freeman, Regina Hill, Mark Nettleton, Carlos Pava, Pujita Sieplinga.

**Staff Members Present:** Janelle Burden Hill, Marie Brill, Enid Gaddis, Kristin Gietzen, Taylor Greenfield, Susan Sheppard, Leah Walton, Cathy Cardosa, Lita Ihle.

**Board Members Absent:** Sonya Hughes, Brett Karhoff, Sue Mason, Kelley Root.

**Guests:** Tami Sytsma, Barb Garza, Stephanie Cleaver.

A. Call to Order, Welcome and Announcements

Mark Nettleton called the meeting to order at 12:00pm. Mark welcomed our guests Tami Sytsma from Sytsma Wealth Strategies, our investment advisors, as well as Barb Garza and Stephanie Cleaver from Andrews, Hooper and Pavlik PLC, our auditors. Mark shared that due to today's full agenda, we have times outlined on the agenda as a guide to keep us on track.

**Pujita Sieplinga moved and Patty Farrell-Cole supported Board approval of the February 8, 2024 Meeting Agenda. The Board approved and the motion carried.**

B. Approval of Board Meeting Minutes of January 11, 2024.

No comments or corrections.

**Judy Freeman moved and Patty Farrell-Cole supported Board approval of January 2024 Meeting Minutes. The Board approved and the motion carried.**

C. Investment Performance Report

Marie welcomed Tami Sytsma of Sytsma Wealth Strategies, who reviewed the 2023 portfolio synopsis. She shared the year end value of \$2,451,724, with a 15.41% return valued at \$327,156.20. We maintained moderate risk allocation with 61% of holdings invested in stocks, and 37% in bonds. Stocks returned 22.78% and bonds returned 6.34%. The Investment Committee met quarterly to review allocation, performance, and compliance with the Investment Policy Statement. The committee reviewed the Investment Policy Statement in October and had no changes. In addition to stocks and bonds, investments also include a short-term savings account with a year end value of \$2,090,969, which is currently yielding 4.73%, earning interest of \$74,107.78 in 2023. This portfolio consists of laddered CDs that mature quarterly, valued at \$250,000 each for full FDIC insurance coverage. As CDs have matured, we purchase a new CD, 3 months out from the latest maturity date, currently at 2 years. We hold \$599,021.98 in money markets, paying just over 5.2%. We will be pulling \$250,000 from the money market to purchase another 2-year CD. The short-term savings Investment Policy Statement was signed in August. A question was asked about predicting what's on the horizon for



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2024. Tami replied that typically election years are positive, with expected volatility in the 3<sup>rd</sup> quarter. The interest rate may change, but specifics can't be predicted.

**D. Arbor Circle FY23 Annual Financial Audit Presentation**

Marie welcomed Barb Garza and Stephanie Cleaver of Andrews, Hooper, and Pavlik PLC, who have been our auditors for the past 5 years. They spent December and January working with our finance team on this audit, and thanked our team for the coordination and accommodation. Barb started by reviewing the services provided a single audit, assistance with preparation of financial statements and SEFA - schedule of expenditures of federal awards (we had approximately 2.2 million in federal awards expended), and federal forms 990 and 990T. She noted that their process is to test in the areas of highest risk, and to seek support through financial documentation. Barb shared that we received a clean, unmodified opinion, which is the best possible outcome for a financial audit. Our 990 is due April 15<sup>th</sup>, we will file for an extension and it will be filed shortly after that time. There were a few items of note. There was an audit adjustment which reclassified \$148,500 of software costs from prepaids to software due to the timing and application of the purchase. In addition, there was an unrecorded misstatement, revenue was understated by \$22,109 due to an unreconciled difference compared to Network 180 revenue confirmation, this was simply due to the timing of payment from Network 180. It was noted that there is also a new standard adopted for leases, lease liability is now added to financial statements, it was previously disclosed as future payments, so there was an adjustment of \$287,000 into the assets and liabilities. Stephanie reviewed the concentration of funding from Network180 and a comparison of 2022 and 2023 finances in the areas of assets, liabilities, support and revenue, and expenses. There was a shift in asset categories as some investments are considered cash equivalents, such as CDs and bonds. In regards to overall programming, program fee revenues were down by 9% due to lower staffing, program expenses were up by 3% mostly due to increases in wages and benefits. We had a 15% increase in our medical insurance, and we raised our 401k match from 2% to 4% to remain competitive. There were some shifts in grant funding sources, but overall they were relatively steady. Our investments did have an increase of approximately \$402,200 due to both unrealized gain and interest income. As noted in the investment presentation that preceded this report, our investment portfolio was altered to consist of more certificates of deposit. Stephanie concluded by noting there was no management letter issued this year, the previous best practice recommendations were implemented so there weren't any new recommendations.

Mark noted that the Audit Committee – which consists of Mark, Brett, former Board Member Jon Sytsma, and community member Corey Balkon – previously reviewed this audit and recommends it for approval by the Board.

**Pujita Sieplinga moved and Carlos Pava supported approval of the Arbor Circle FY2023 Financial Statements and Federal Single Audit. Motion carried.**



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E. Finance Report - Review and Approval of December 2023 Financial Statements

Marie Brill provided the December 2023 Financial Statement. Net gain for the month is \$199,642 and the gain YTD is \$75,575. Arbor Circle Other is where the restricted revenues are being applied from, to the programs, for United Way and other restricted revenues received in the prior year(s). Non-Program services have a net gain of \$272,576 and are \$242,951 above budget year to date. This is mostly due to gain on investments. Program services have a net loss of (\$118,013) and a negative budget variance of (\$112,503) year to date. Total program and non-program services have a net gain of \$154,564 and a positive budget variance of \$130,448. Outpatient Counseling and Early Childhood have the largest negative budget variances. Child Welfare and Youth Development Services have the largest positive budget variances. On the balance sheet, cash decreased approximately \$135,000. Accounts receivable increased approximately \$260,000. Accounts payable and accrued wages decreased approximately \$75,000. Our Investments and Endowment increased approximately \$118,000.

<b>Cash balances for the current and prior two months are:</b>				
		<b>12/31/23</b>	<b>11/30/23</b>	<b>10/31/23</b>
Huntington Bank	Checking	\$753	\$753	\$483
Macatawa Bank	Checking	\$750,808	\$939,272	\$255,653
Raymond James	Savings	\$335,098	\$281,948	\$829,464
Independent Bank	Savings	\$1,341	\$1,200	\$990
Chase Bank	Checking	\$2,786	\$2,771	\$2,676
Cash on Hand (Various Locations)		\$1,323	\$1,327	\$1,414
<b>Total Cash Balance</b>		<b>\$1,092,110</b>	<b>\$1,227,271</b>	<b>\$1,090,680</b>

<b>Investment balances for the current and prior two months are:</b>			
	<b>12/31/23</b>	<b>11/30/23</b>	<b>10/31/23</b>
Investment Account - Raymond James - long-term	\$2,399,829	\$2,340,775	\$2,183,284
Investment Account - Raymond James - short-term	\$2,142,864	\$2,083,628	\$2,069,483
Endowment at GRCF*	\$191,686	\$191,686	\$191,636
<b>Total Investment Balance</b>	<b>\$4,734,379</b>	<b>\$4,616,089</b>	<b>\$4,444,403</b>

*\*In addition to this balance, we also have \$346 held in endowment at GRCF*



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<b>Accounts Receivable Aging Detail:</b>					
<b>As of 12/31/2023:</b>					
	<b>Total</b>	<b>0 - 30</b>	<b>31 - 60</b>	<b>61 - 90</b>	<b>Over 90</b>
Client accounts receivable	\$828,648	\$114,088	\$365,726	\$240,204	\$108,629
Other accounts receivable	\$1,688,484	\$1,044,208	\$365,726	\$176,983	\$101,567
Total A/R as of 12/31/2023	\$2,517,132	\$1,158,297	\$731,453	\$417,187	\$210,196
	100%	46%	29%	17%	8%
Total A/R for prior month	\$2,257,320	\$1,160,960	\$513,462	\$419,882	\$163,016
	100%	51%	23%	19%	7%
Total A/R for prior year	\$2,030,609	\$1,391,487	\$405,574	\$150,657	\$82,892
	100%	69%	20%	7%	4%

**Regina Hill moved and Judy Freeman supported Board approval of December 2023 financial statements. The Board approved and the motion carried.**

**F. Program Presentation – FY23 Human Capital Summary**

Susan introduced Cathy Cardosa, Human Resources Director. Cathy shared a little bit about her team, which consists of 4 people including herself, a payroll & benefits specialist, an HR generalist, and new to the team this year a talent & acquisition specialist. Cathy then reviewed the agency’s Human Capital summary. In the area of employee feedback, we survey in three different categories – staff engagement & satisfaction (where we scored 87%), supervisor survey (scoring at 94%), and a survey on psychological safety (scoring 90%). Response rates ranged from 40-60%, above the industry standard of 30-40%. Cathy reviewed the number of staff at the agency, we’ve remained somewhat consistent in number of staff over the past 5 years, but have more open positions now than we previously have. We currently have 40 positions open, several are because of new grants, but in other areas it’s because we are struggling to retain entry level staff, and to recruit more specialized staff. Implications of open positions include reduction in revenue when billable staffing positions are unfilled. We have also had more requests for part-time positions, which may mean lower salary and PTO, but training and other benefits have the same costs, and there is a reduction in billable productivity. Cathy reviewed the employees by division (7 divisions plus administrative and support) and classification, as well as staff demographics and longevity. She highlighted that we have over 18% of staff who have been here over 10 years, but over 50% have been here under 3 years. In terms of retention, we use the National Bureau of Labor Statistics under the category of Social Assistance Employees. The retention average is 63%, we have a goal of 80% and are currently at 76%. Cathy shared that we attempt to conduct exit surveys with every exiting employee. She reviewed the reasons for employee departure. An increasing number of people are leaving the field altogether, but most are still leaving for work/life balance or to seek a different type of position still in the field.



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Cathy discussed the need to fill employee vacancies, noting that the Child Welfare and Outpatient divisions are our biggest areas of need and concern, aside from client care needs, these are programs where we need staff in order to generate revenue. Recruitment strategies were discussed, including increased marketing and branding efforts, increased investment in our internship program since we hire about 47% of our interns each year, and adjustment of position expectations such as shifting to PT positions and being willing to hire staff with a limited license in some cases rather than requiring a candidate to be fully licensed. Board members shared ideas for connecting to schools and candidates, and for promoting the agency in new ways.

G. Mission, Vision, Values Reveal and Approval

Kristin shared the final proposal for the refreshed agency mission statement, vision statement, and values. She noted that agency staff, leadership, and Board members have been through a visioning process for over a year to give input on how to refresh the previous statement to better capture the essence of our work and streamline our values for the community. The proposed statements are as follow:

Refreshed mission statement

*Arbor Circle advances mental wellbeing through counseling and supportive services in partnership with people and communities.*

Refreshed vision statement

*Arbor Circle is a valued partner in shaping a community where all people can flourish.*

Refreshed organizational values

- *Listening*
- *Engagement*
- *Growth*

**Pujita Sieplinga moved and Regina Hill supported approval of the new agency mission, vision, and values. The Board approved and the motion carried.**

H. Board Action Item – Approval of grant submission

Kristin shared that we are applying for funds from the City of Grand Rapids for the Neighborhood Investment Plan, and it requires Board approval for submission.

**Patty Farrell-Cole moved and Judy Freeman supported that the Arbor Circle Board approve the submission of Arbor Circle’s application to the City of Grand Rapids for Neighborhood Investment (NI) Plan funds for The Bridge services in the amount of \$75,000. The motion passed.**



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- I. Committee Reports
- a. Exec & Finance – Mark shared that the committee reviewed the agenda, focusing on the budget, audit, and mission statement.
  - b. Governance – Patty reminded members of the Board pairings, and shared that we have 2 dates set for the Board volunteering at the Bridge – one on February 27<sup>th</sup> and another on March 21<sup>st</sup>. Janelle will send a SignUpGenius out to the group. Taylor reminded everyone about the Board portal and added that the signup will be posted there as well.  
[www.arborcircle.org/board-resources](http://www.arborcircle.org/board-resources)
  - c. Community Engagement and Events – Gwen gave updates on our events.  
**Growing Together** was held on January 11<sup>th</sup>. We received great feedback from participants, highlights included the open and honest sharing by panelists and broad representation of experiences. Some constructive feedback was given around the clarity of the slides used to share data. We will plan to host the event again next year, we are open to suggested topics that relate to the legacy of Dr. King.  
**Spring Forward** - The date is saved for Wednesday May 22<sup>nd</sup> back at Millennium Park's Grant Pavilion. Registration is live for this event: <https://arborcircle.org/event/spring-forward/>. Janelle also gave a committee update. The group is hosting an engagement activity week to assemble Valentine's treat bags for youth. The committee will have its quarterly meeting virtually in March.
  - d. Development – Judy reminded the Board about Spring Dinner and Regional sponsorship opportunities. Physical packets were available at the meeting and shared virtually. Taylor will present a Development presentation at the March Board Meeting, it will include guidance on discovering and engagement of your circles of connection.
  - e. Facilities – the committee met today for its quarterly meeting, they reviewed the Allegan and Newaygo leases, and the upcoming Bridge renovations. We are pleased to share that the window installation at the Bridge has been completed.
  - f. Investment – Report already given in presentation.
  - g. Audit – Report already given in presentation.
- J. Other Business
- Judy shared that she has assembled the CEO review. Janelle noted that we'd be sending an email with a Doodle poll to schedule our annual Board conversations.
- K. Next Meeting: March 14, 2024 12-1:30pm – 1560 Leonard NE.
- L. Meeting Feedback and Adjournment – Judy adjourned the meeting at 1:31pm.

**Arbor Circle Corporation**  
**Financial Statement Summary**  
**1/31/2024**

**Net loss for the month is (\$35,671) and the gain YTD is \$39,904.**

**Program and Non-Program Services highlights:**

- Arbor Circle Other is where the restricted revenues are being applied from, to the programs, for United Way and other restricted revenues received in the prior year(s).
- Non-Program services have a net gain of \$269,355 and are \$233,476 above budget year to date. This is mostly due to gain on investments.
- Program services have a net loss of (\$138,411) and a negative budget variance of (\$84,653) year to date. Total program and non-program services have a net gain of \$130,944 and a positive budget variance of \$148,822.
- Outpatient Counseling and Early Childhood have the largest negative budget variances. Child Welfare and Youth Development Services have the largest positive budget variances.

On the balance sheet, cash increased approximately \$160,000. Accounts receivable increased approximately \$74,000. Accounts payable and accrued wages increased approximately \$239,000. Our Investments and Endowment increased approximately \$15,000.

<b>Cash balances for the current and prior two months are:</b>				
		<u>1/31/24</u>	<u>12/31/23</u>	<u>11/30/23</u>
Huntington Bank	Checking	\$1,078	\$753	\$753
Macatawa Bank	Checking	\$908,152	\$750,808	\$939,272
Raymond James	Savings	\$336,477	\$335,098	\$281,948
Independent Bank	Savings	\$2,091	\$1,341	\$1,200
Chase Bank	Checking	\$2,916	\$2,786	\$2,771
Cash on Hand (Various Locations)		\$1,218	\$1,323	\$1,327
<b>Total Cash Balance</b>		<b>\$1,251,932</b>	<b>\$1,092,110</b>	<b>\$1,227,271</b>

<b>Investment balances for the current and prior two months are:</b>			
	<u>1/31/24</u>	<u>12/31/23</u>	<u>11/30/23</u>
Investment Account - Raymond James - long-term	\$2,460,017	\$2,399,829	\$2,340,775
Investment Account - Raymond James - short-term	\$2,097,514	\$2,142,864	\$2,083,628
Endowment at GRCF*	\$191,686	\$191,686	\$191,686
<b>Total Investment Balance</b>	<b>\$4,749,217</b>	<b>\$4,734,379</b>	<b>\$4,616,089</b>

\* In addition to this balance, we also have \$346 held in endowment at GRCF

<b>Accounts Receivable Aging Detail:</b>					
<b>As of 1/31/2024:</b>					
	<u>Total</u>	<u>0 - 30</u>	<u>31 - 60</u>	<u>61 - 90</u>	<u>Over 90</u>
Client accounts receivable	\$1,007,336	\$198,592	\$258,861	\$240,244	\$309,640
Other accounts receivable	\$1,583,864	\$1,217,707	\$90,164	\$122,088	\$153,905
<b>Total A/R as of 1/31/2024</b>	<b>\$2,591,201</b>	<b>\$1,416,299</b>	<b>\$349,025</b>	<b>\$362,332</b>	<b>\$463,546</b>
	100%	55%	13%	14%	18%
Total A/R for prior month	\$2,517,132	\$1,158,297	\$731,453	\$417,187	\$210,196
	100%	46%	29%	17%	8%
Total A/R for prior year	\$2,089,227	\$1,486,907	\$335,673	\$153,213	\$113,433
	100%	71%	16%	7%	5%



**Arbor Circle Corporation**  
**Financial Report for Month Ending January 31, 2024**

Program	FY24 Annual Budget			YTD BUDGET			YTD ACTUAL			Positive/ (Negative) Budget/ Actual
	2023-24 Revenue*	2023-24 Expense*	Net Gain/ (Loss)	2023-24 Revenue*	2023-24 Expense*	Net Gain/ (Loss)	2023-24 Revenue*	2023-24 Expense*	Net Gain/ (Loss)	
108 Psychiatry	294,185	316,817	(22,632)	98,062	105,704	(7,642)	83,081	91,281	(8,200)	(558)
230 OCC Counseling	2,170,270	2,382,695	(212,425)	695,592	737,295	(41,702)	614,566	752,844	(138,278)	(96,576)
231 School Based Services	879,071	879,071	0	290,843	294,838	(3,995)	287,467	284,881	2,586	6,581
232 Childhood Healing	592,724	592,724	0	197,575	197,575	0	97,369	97,901	(531)	(531)
340 AC Counseling-Newaygo	689,465	740,714	(51,250)	225,398	218,123	7,274	177,451	213,282	(35,831)	(43,105)
350 Ottawa Outpatient	327,964	357,176	(29,212)	109,080	119,976	(10,895)	139,668	139,668	0	10,895
355 Allegan Outpatient	210,169	295,400	(85,231)	70,056	97,421	(27,365)	45,136	94,503	(49,366)	(22,002)
360 Allegan CBRS	99,041	175,481	(76,440)	33,014	58,039	(25,025)	15,631	69,298	(53,667)	(28,643)
371 Jail Services	593,297	594,372	(1,075)	197,766	199,325	(1,559)	196,811	186,874	9,937	11,497
375 CBRS Jail Programs	64,545	64,545	0	21,515	21,607	(92)	20,574	21,697	(1,122)	(1,030)
380 Muskegon Outpatient	176,421	181,364	(4,943)	58,807	50,549	8,259	26,560	56,111	(29,551)	(37,810)
381 Muskegon Recovery Management	156,996	205,143	(48,147)	52,332	68,390	(16,058)	52,630	69,341	(16,711)	(652)
410 Parent Nurturing Service	136,868	126,614	10,254	45,623	42,388	3,234	32,708	32,200	508	(2,727)
411 Infant Toddler Development	1,462,721	1,419,800	42,921	479,350	461,530	17,820	379,194	452,290	(73,096)	(90,915)
416 Strong Beginnings	286,115	286,115	0	95,372	91,039	4,333	99,825	107,390	(7,565)	(11,898)
475 Healthy Families	798,552	798,552	0	266,184	267,863	(1,679)	251,210	251,210	0	1,679
495 Family Engagement Team	482,164	542,020	(59,856)	160,721	181,903	(21,182)	162,326	173,494	(11,168)	10,014
496 Women's Case Management	432,679	456,309	(23,630)	144,226	153,020	(8,794)	139,751	158,114	(18,363)	(9,569)
497 Recovery Management Service	170,306	205,458	(35,152)	56,769	68,945	(12,177)	53,259	64,112	(10,853)	1,324
530 The Bridge	731,705	883,292	(151,587)	243,902	294,431	(50,529)	363,777	355,429	8,348	58,878
531 Outreach	243,280	265,079	(21,799)	81,093	93,855	(12,762)	75,077	78,937	(3,860)	8,902
533 Supportive Housing	1,022,743	1,050,354	(27,611)	374,879	349,279	25,600	263,298	269,858	(6,560)	(32,160)
610 OSAP/SLIC/ROADD	410,245	410,245	0	136,748	137,566	(817)	153,144	153,144	0	817
611 Parenting	208,651	208,651	0	69,550	70,180	(630)	66,746	66,745	1	631
614 SCAN	86,536	86,536	0	27,512	27,620	(108)	23,456	23,456	0	108
615 TTQ	446,491	446,491	0	149,810	149,525	285	174,828	169,337	5,490	5,205
781 WrapAround	995,673	887,136	108,536	331,891	296,656	35,235	385,964	323,463	62,501	27,266
786 CLS/Respite	126,842	117,567	9,275	43,969	39,256	4,714	19,950	20,316	(366)	(5,080)
787 Kent School Services Network	1,068,181	977,570	90,611	319,581	328,478	(8,897)	278,638	316,085	(37,447)	(28,550)
791 Behavioral Health Home	3,166,251	2,681,808	484,443	1,055,417	889,945	165,472	1,077,400	910,189	167,210	1,739
820 Foster Care	1,988,240	1,881,451	106,789	500,071	578,816	(78,744)	709,779	578,924	130,855	209,600
822 Adoption	347,400	309,388	38,012	115,800	103,522	12,278	91,895	107,635	(15,739)	(28,018)
823 CASA	178,440	193,127	(14,687)	59,480	65,409	(5,929)	69,427	79,258	(9,831)	(3,902)
932 Great Start	1,086,460	1,086,460	0	362,153	363,832	(1,679)	306,669	304,411	2,258	3,937
<b>Total Program Services</b>	<b>22,130,691</b>	<b>22,105,527</b>	<b>25,164</b>	<b>7,170,142</b>	<b>7,223,900</b>	<b>(53,758)</b>	<b>6,935,266</b>	<b>7,073,677</b>	<b>(138,411)</b>	<b>(84,653)</b>
102 Corporate Development	222,000	406,268	(184,268)	81,167	130,755	(49,588)	115,765	121,759	(5,993)	43,594
103 Investments	235,000	20,000	215,000	78,333	6,667	71,667	278,073	9,016	269,057	197,391
210 Leonard Buildings	110,727	69,012	41,715	36,909	23,109	13,800	36,909	30,618	6,291	(7,509)
<b>Total Non-Program Services</b>	<b>567,727</b>	<b>495,280</b>	<b>72,447</b>	<b>196,409</b>	<b>160,530</b>	<b>35,879</b>	<b>430,747</b>	<b>161,393</b>	<b>269,355</b>	<b>233,476</b>
<b>Total Program/Non-Program Services</b>	<b>22,698,418</b>	<b>22,600,807</b>	<b>97,611</b>	<b>7,366,551</b>	<b>7,384,430</b>	<b>(17,879)</b>	<b>7,366,014</b>	<b>7,235,070</b>	<b>130,944</b>	<b>148,822</b>
104 Arbor Circle Other	0	0	0	(30,208)	0	(30,208)	(91,040)	0	(91,040)	(60,831)
<b>Total Net Income (Loss)</b>	<b>22,698,418</b>	<b>22,600,807</b>	<b>97,611</b>	<b>7,336,343</b>	<b>7,384,430</b>	<b>(48,087)</b>	<b>7,274,974</b>	<b>7,235,070</b>	<b>39,904</b>	<b>87,991</b>

\*Budget effective 10/01/23

**Arbor Circle Corporation**  
**Financial Summary By Program and Non-Program Services**  
**For Month Ending January 31, 2024**

	FY24 Annual Budget			YTD BUDGET			YTD ACTUAL			Positive/ (Negative) Budget/ Actual
	2023-24 Revenue	2023-24 Expense	Net Gain/ (Loss)	2023-24 Revenue	2023-24 Expense	Net Gain/ (Loss)	2023-24 Revenue	2023-24 Expense	Net Gain/ (Loss)	
<b>Program Services</b>										
Psychiatry (108)	294,185	316,817	(22,632)	98,062	105,704	(7,642)	83,081	91,281	(8,200)	(558)
Outpatient Counseling (230-355, 380)	5,046,084	5,429,145	(383,061)	1,647,352	1,715,776	(68,424)	1,388,217	1,639,188	(250,971)	(182,547)
Community Based Recovery Services (360-375, 381, 495-497)	1,999,029	2,243,329	(244,300)	666,343	751,230	(84,887)	640,983	742,930	(101,947)	(17,060)
Early Childhood (410-475)	2,684,256	2,631,081	53,174	886,528	862,820	23,708	762,938	843,091	(80,153)	(103,861)
Youth Development Services (530)	1,997,728	2,198,725	(200,997)	699,874	737,565	(37,691)	702,153	704,224	(2,071)	35,620
Prevention and Advocacy (610-615, 932)	2,238,383	2,238,383	0	745,774	748,723	(2,949)	724,842	717,093	7,749	10,698
Family Based Services (781-791)	5,356,947	4,664,082	692,865	1,750,858	1,554,335	196,523	1,761,951	1,570,053	191,898	(4,625)
Child Welfare (820-823)	2,514,080	2,383,966	130,114	675,351	747,747	(72,395)	871,102	765,817	105,285	177,680
<b>Total Program Services</b>	<b>22,130,691</b>	<b>22,105,527</b>	<b>25,164</b>	<b>7,170,142</b>	<b>7,223,900</b>	<b>(53,758)</b>	<b>6,935,266</b>	<b>7,073,677</b>	<b>(138,411)</b>	<b>(84,653)</b>
<b>Non-Program Services</b>										
Corporate Development (102)	222,000	406,268	(184,268)	81,167	130,755	(49,588)	115,765	121,759	(5,993)	43,594
Investments (103)	235,000	20,000	215,000	78,333	6,667	71,667	278,073	9,016	269,057	197,391
Leonard building (rental) (210)	110,727	69,012	41,715	36,909	23,109	13,800	36,909	30,618	6,291	(7,509)
<b>Total Non-Program Services</b>	<b>567,727</b>	<b>495,280</b>	<b>72,447</b>	<b>196,409</b>	<b>160,530</b>	<b>35,879</b>	<b>430,747</b>	<b>161,393</b>	<b>269,355</b>	<b>233,476</b>
<b>Total Program and Non-Program Services</b>	<b>22,698,418</b>	<b>22,600,807</b>	<b>97,611</b>	<b>7,366,551</b>	<b>7,384,430</b>	<b>(17,879)</b>	<b>7,366,014</b>	<b>7,235,070</b>	<b>130,944</b>	<b>148,822</b>
Arbor Circle Other (104)**	-	-	-	(30,208)	-	(30,208)	(91,040)	-	(91,040)	(60,831)
<b>Total net income (loss)</b>	<b>22,698,418</b>	<b>22,600,807</b>	<b>97,611</b>	<b>7,336,343</b>	<b>7,384,430</b>	<b>(48,087)</b>	<b>7,274,974</b>	<b>7,235,070</b>	<b>39,904</b>	<b>87,991</b>

\*Budget effective 10/01/23

\*\*Arbor Circle Other includes revenue transfers for United Way and other funding recognized and recorded in prior fiscal year(s)

**Arbor Circle Corporation**  
**Year to Year Financial Summary**  
**For Month Ending January 31, 2024**

	FY24 YTD ACTUAL - Current Year			FY23 YTD ACTUAL - Prior Year			Variance
	2023-24 Revenue	2023-24 Expense	Net Gain/ (Loss)	2022-23 Revenue	2022-23 Expense	Net Gain/ (Loss)	
Program Services							
Psychiatry (108)	83,081	91,281	(8,200)	81,245	87,438	(6,194)	(2,007)
Outpatient Counseling (230-355, 380)	1,388,217	1,639,188	(250,971)	1,123,226	1,442,934	(319,708)	68,737
Community Based Recovery Services (360-375, 381, 495-497)	640,983	742,930	(101,947)	638,565	724,649	(86,084)	(15,864)
Early Childhood (410-475)	762,938	843,091	(80,153)	652,446	697,259	(44,813)	(35,340)
Youth Development Services (530)	702,153	704,224	(2,071)	443,544	594,432	(150,888)	148,817
Prevention and Advocacy (610-615, 932)	724,842	717,093	7,749	599,539	587,210	12,329	(4,580)
Family Based Services (781-791)	1,761,951	1,570,053	191,898	1,660,258	1,324,171	336,088	(144,190)
Child Welfare (820-823)	871,102	765,817	105,285	830,692	718,571	112,121	(6,837)
<b>Total Program Services</b>	<b>6,935,266</b>	<b>7,073,677</b>	<b>(138,411)</b>	<b>6,029,516</b>	<b>6,176,664</b>	<b>(147,148)</b>	<b>8,737</b>
Non-Program Services							
Corporate Development (102)	115,765	121,759	(5,993)	125,017	117,989	7,028	(13,022)
Investments (103)	278,073	9,016	269,057	268,724	8,059	260,665	8,392
Leonard building (rental) (210)	36,909	30,618	6,291	29,952	27,629	2,323	3,968
<b>Total Non-Program Services</b>	<b>430,747</b>	<b>161,393</b>	<b>269,355</b>	<b>423,693</b>	<b>153,676</b>	<b>270,017</b>	<b>(662)</b>
<b>Total Program and Non-Program Services</b>	<b>7,366,014</b>	<b>7,235,070</b>	<b>130,944</b>	<b>6,453,209</b>	<b>6,330,341</b>	<b>122,868</b>	<b>8,075</b>
Arbor Circle Other (104)**	(91,040)	-	(91,040)	(76,434)	-	(76,434)	(14,606)
<b>Total net income (loss)</b>	<b>7,274,974</b>	<b>7,235,070</b>	<b>39,904</b>	<b>6,376,775</b>	<b>6,330,341</b>	<b>46,434</b>	<b>(6,530)</b>

\*\*Arbor Circle Other includes revenue transfers for United Way and other funding recognized and recorded in prior fiscal year(s).

Arbor Circle Corporation  
BALANCE SHEET  
JANUARY 31, 2024

	YEAR TO DATE	
	ACTUAL	PRIOR PERIOD
ASSETS		
CURRENT ASSETS		
Cash & Cash Equivalents-Other	1,249,841.14	1,090,768.85
Cash & Cash Equivalents-Saving	2,090.71	1,340.71
Accts Receivable - Federal	193,502.78	318,491.20
Accts Rec - N180/CMH Other	185,925.02	160,725.85
Accts Receivable - DHS (FIA)	146,424.76	266,649.32
Accts Receivable - Grants	330,221.63	240,040.96
Accts Receivable - FC/Adoption	268,562.62	350,762.56
Accts Receivable - Other	459,227.58	351,814.45
A/R - Client Billings	1,007,336.32	759,801.41
Promise to Give - United Way	56,029.33	59,805.53
AR Medicaid Outreach	84,841.53	84,841.53
Prepaid Expenses and Other	297,157.17	287,533.63
ROU Asset	297,611.14	297,611.14
<b>TOTAL CURRENT ASSETS</b>	<b>4,578,771.73</b>	<b>4,270,187.14</b>
FIXED ASSETS		
Property and Equipment	5,798,351.27	5,798,351.27
Accumulated Depreciation	2,748,288.95	2,730,319.94
Construction in Progress	.00	.00
<b>TOTAL FIXED ASSETS</b>	<b>3,050,662.32</b>	<b>3,068,031.33</b>
OTHER ASSETS		
Investments - Long Term	2,460,016.88	2,399,829.19
Investments - Short Term	2,097,514.43	2,142,863.62
GRCF Endowment	167,436.09	167,436.09
GRCF - Spendable Balance	24,250.00	24,250.00
<b>TOTAL OTHER ASSETS</b>	<b>4,749,217.40</b>	<b>4,734,378.90</b>
<b>TOTAL ASSETS</b>	<b>12,378,051.45</b>	<b>12,072,597.37</b>
LIABILITIES AND NET ASSETS		
LIABILITIES		
Accounts Payable	323,365.01	289,368.28
Current Portion OCC Loan	46,496.23	46,353.77
Current Portion Holland Loan	.00	.00
Current Portion Leonard Loan	38,658.86	38,540.42
Current Lease Liability	98,155.62	98,155.62
Payroll Protection Plan Loan	.00	.00
Accrued Wages & Payroll Taxes	806,031.99	600,698.77
Deferred Revenue	976,009.16	869,222.40
<b>TOTAL CURRENT LIABILITIES</b>	<b>2,288,716.87</b>	<b>1,942,339.26</b>
LT Portion OCC Loan	956,151.72	960,043.00
LT Portion Holland Loan	.00	.00
LT Portion Leonard Bldg Loan	794,985.37	798,220.74
LT Portion Lease Liability	189,340.52	189,340.52
YAS Fiduciary Funds	9,154.26	7,279.88
LYL	3,230.39	3,230.39
LT Security Deposit	7,488.00	7,488.00
<b>TOTAL LONG TERM LIABILITIES</b>	<b>1,960,350.26</b>	<b>1,965,602.53</b>
<b>TOTAL LIABILITIES</b>	<b>4,249,067.13</b>	<b>3,907,941.79</b>
DEFERRED REVENUE		
Board Design Future Yr U.W.	.00	.00
Deferred Revenue	.00	.00
Deferred Medicaid Outreach	41,108.78	41,108.78
<b>TOTAL DEFERRED REVENUE</b>	<b>41,108.78</b>	<b>41,108.78</b>
NET ASSETS		
Permanently Restricted	167,436.09	167,436.09
Temporarily Restricted	204,947.45	216,999.04
Board Designated Net Assets	.00	.00
Unrestricted Net Assets -Prior	7,675,587.95	7,663,536.36
<b>NET ASSETS (CURRENT YEAR)</b>	<b>39,904.05</b>	<b>75,575.31</b>
<b>TOTAL NET ASSETS</b>	<b>8,087,875.54</b>	<b>8,123,546.80</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>12,378,051.45</b>	<b>12,072,597.37</b>

Arbor Circle Corporation  
INCOME STATEMENT

JANUARY 31, 2024

	PERIOD TO DATE	YEAR TO DATE	BUDGET	PERCENT
	JANUARY	ANNUAL Y-T-D	Y-T-D	OF BUDGET
<b>REVENUE:</b>				
Network 180 Grants	530,732.42	2,116,571.86	2,095,022.64	101.03
Other County/State Depts	437,619.66	1,781,496.18	1,632,329.28	109.14
Federal Government Revenue	124,277.75	421,407.55	535,490.16	78.70
United Way Community Care	11,635.14	42,946.55	40,564.52	105.87
United Way Designated	946.83	1,570.45	1,333.32	117.78
Medicaid Outreach Revenue	.00	.00	.00	.00
Other Grants	270,534.61	1,008,809.35	1,176,010.40	85.78
<b>Total Contractual Revenues</b>	<b>1,375,746.41</b>	<b>5,372,801.94</b>	<b>5,480,750.32</b>	<b>98.03</b>
<b>Service Reimbursements</b>				
Medicaid Reimbursements	46,089.30	184,023.80	104,538.70	176.03
Medicare Reimbursements	8,421.84	35,389.84	50,560.68	69.99
Government Reimbursements	21,086.42	38,067.39	37,987.32	100.21
Commercial Insurances	198,903.10	642,437.20	245,530.19	261.65
Client Pay	16,999.48	41,287.48	32,844.48	125.71
CMH Fees-Other	2,067.64	2,877.14	.00	.00
CMH Fee for Service	265,781.78	906,116.77	1,349,698.86	67.13
Discretionary Reimbursements	3,917.50	11,173.81	15,094.64	74.03
Contractual Allowances	(81,495.51)	(401,255.82)	(189,001.76)	212.30
<b>Total Service Reimbursements</b>	<b>481,771.55</b>	<b>1,460,117.61</b>	<b>1,647,253.11</b>	<b>88.64</b>
<b>Fund-raising</b>				
Donations	2,012.99	108,757.73	88,355.00	123.09
United Way Transfer	(11,635.14)	(42,946.55)	(30,208.44)	142.17
Special Events	5,500.00	26,000.00	.00	.00
<b>Total Fund-raising Revenues</b>	<b>(4,122.15)</b>	<b>91,811.18</b>	<b>58,146.56</b>	<b>157.90</b>
<b>Other</b>				
Donated Goods and Services	3,990.27	31,599.16	20,500.00	154.14
Miscellaneous	2,926.05	6,841.58	14,783.64	46.28
Interest and Dividend Income	449.24	1,175.05	3,000.00	39.17
Rental Income	9,227.28	36,909.12	36,909.00	100.00
<b>Total Other Revenues</b>	<b>16,592.84</b>	<b>76,524.91</b>	<b>75,192.64</b>	<b>101.77</b>
<b>TOTAL REVENUES</b>	<b>1,869,988.65</b>	<b>7,001,255.64</b>	<b>7,261,342.63</b>	<b>96.42</b>

Arbor Circle Corporation  
INCOME STATEMENT

JANUARY 31, 2024

	PERIOD TO DATE	YEAR TO DATE	BUDGET Y-T-D	PERCENT OF BUDGET
	JANUARY	ANNUAL Y-T-D		
EXPENDITURES:				
Salaries	1,218,227.44	4,601,033.48	4,639,150.30	99.18
FICA	88,615.88	330,340.13	381,069.04	86.69
Unemployment	3,821.69	6,442.21	9,202.38	70.01
Workman's Compensation	6,835.44	27,341.89	31,575.76	86.59
Health/Dental/Vision Insurance	128,739.93	462,335.38	473,896.40	97.56
Disability/Life Insurance	8,392.37	29,989.15	29,999.92	99.96
Pension	31,675.26	114,441.33	120,064.64	95.32
Other Employee Benefits	7,118.37	11,348.12	7,031.88	161.38
Contracted Svcs Direct	25,375.00	101,200.00	107,126.68	94.47
Contracted Svcs Indirect	54,945.74	213,206.60	221,888.59	96.09
Sent To Collection	.00	.00	4,333.32	.00
Recovery Sent to Collection	.00	(153.51)	(1,000.00)	15.35
Calc Doubtful Acct Allowance	.00	.00	.00	.00
Write-Off Expense	4,459.47	26,914.90	23,833.32	112.93
Respite Services Purchased	319.75	3,926.45	3,500.00	112.18
Client Discretionary	83,080.89	359,948.46	323,973.68	111.10
Client Transportation	2,386.73	8,625.75	8,422.20	102.42
Operating Supplies	32,123.70	72,247.86	135,700.00	53.24
Occupancy Expenses	57,175.28	213,265.50	183,490.75	116.23
Office Supplies	676.64	6,128.42	5,596.96	109.50
Printing	960.03	4,543.09	4,298.36	105.69
Telephone	14,990.26	59,524.23	62,888.44	94.65
Postage	967.06	2,053.18	2,536.80	80.94
Dues and Subscriptions	28,667.16	102,680.46	132,220.53	77.66
Events	2,752.07	6,052.56	6,083.36	99.49
Recruitment & Advertising	23,245.57	38,627.05	28,216.72	136.89
Public Awareness	.00	.00	1,500.00	.00
Insurance Expense	9,669.38	38,677.48	40,511.72	95.47
Staff Travel	39,732.19	168,566.88	180,559.68	93.36
Miscellaneous	1,907.74	5,987.31	7,133.40	83.93
Equipment Purchases	5,893.61	49,542.60	23,116.36	214.32
Conferences	11,689.06	35,198.32	61,845.80	56.91
Donated Goods & Services	3,990.27	31,599.16	20,500.00	154.14
Billing Support	.00	.00	.00	.00
Program Support	.00	.00	.00	.00
Administration	.00	.00	177.28	.00
<b>TOTAL EXPENDITURES</b>	<b>1,898,433.98</b>	<b>7,131,634.44</b>	<b>7,280,444.27</b>	<b>97.96</b>
<b>OPERATING INCOME (LOSS)</b>	<b>(28,445.33)</b>	<b>(130,378.80)</b>	<b>(19,101.64)</b>	<b>682.55</b>
Other (Revenues)/Expenses				
Depreciation Building & Improv	12,138.13	48,552.43	48,187.60	100.76
Depreciation Equipment	5,668.79	22,673.55	26,832.24	84.50
Mortgage Interest Expense	5,635.84	23,548.38	22,298.95	105.60
Investment Fees	4,598.13	9,015.52	6,666.68	135.23
Investment Interest Income	(5,989.73)	(48,899.14)	(20,000.00)	244.50
Unrealized (Gain) Loss Invest.	(14,825.23)	(225,173.59)	(55,000.00)	409.41
<b>TOTAL OTHER (REVENUES)/EXPENSES</b>	<b>7,225.93</b>	<b>(170,282.85)</b>	<b>28,985.47</b>	<b>(587.48)</b>
<b>NET REVENUES OVER/(UNDER) EXPENSES</b>	<b>(35,671.26)</b>	<b>39,904.05</b>	<b>(48,087.11)</b>	<b>(82.98)</b>
BASE PERCENTAGE:	25.00	25.00	25.00	100.00

Arbor Circle Corporation  
Statement of Cash Flows  
For the Month Ended January 31, 2024

<b>Cash flows from operating activities</b>	<b>ACTUAL</b>	<b>YTD</b>
Change in net assets	\$ (35,671)	\$ 39,904
Adjustments to reconcile change in net assets to net cash provided by (used in) operating activities		
Depreciation	\$ 17,969	\$ 71,875
Changes in operating assets and liabilities which provided (used) cash		
Receivables	\$ (142,053)	\$ (263,365)
Prepaid expenses	\$ (9,624)	\$ (8,626)
Accounts payable	\$ 33,997	\$ (64,207)
Fiduciary funds	\$ 1,874	\$ (446)
Accrued wages and payroll taxes	\$ 205,333	\$ 403,899
Change in Lease Liability	\$ -	\$ -
Unearned/Deferred Revenue	\$ 109,701	\$ 164,024
<b>Net cash provided by (used in) operating activities</b>	<b>\$ 181,527</b>	<b>\$ 343,058</b>
<b>Cash flows from investing activities</b>		
Addition of Property and Equipment	\$ -	\$ -
Disposal of Property and Equipment	\$ -	\$ -
Arbor Circle Endowment	\$ -	\$ -
Investment (Income)/Loss	\$ (14,839)	\$ (255,676)
Purchase of Investments	\$ -	\$ -
<b>Net cash provided by (used in) investing activities</b>	<b>\$ (14,839)</b>	<b>\$ (255,676)</b>
<b>Cash flows from financing activities</b>		
OCC loan	\$ (3,749)	\$ (15,127)
Leonard Buildings loan	\$ (3,117)	\$ (12,577)
<b>Net cash provided by (used in) financing activities</b>	<b>\$ (6,866)</b>	<b>\$ (27,705)</b>
Net increase (decrease) in cash and cash equivalents	\$ 159,822	\$ 59,678
Cash and cash equivalents, beginning of month	\$ 1,092,110	\$ 1,192,254
<b>Cash and cash equivalents, end of month</b>	<b>\$ 1,251,932</b>	<b>\$ 1,251,932</b>



**Healthy Families Kent County - HFKC**  
2024



# Program Overview

Healthy Families Kent County (HFKC) is a home visiting program that works with Kent County families who have two forms of identified **risk** to help strengthen the bond between parent and child.

## **Goals:**

- **Cultivate and strengthen** nurturing parent-child relationships.
- Promote healthy **growth and development**.
- Enhance family functioning by **reducing risk** and **building protective factors**.
- Build and sustain **community partnerships**

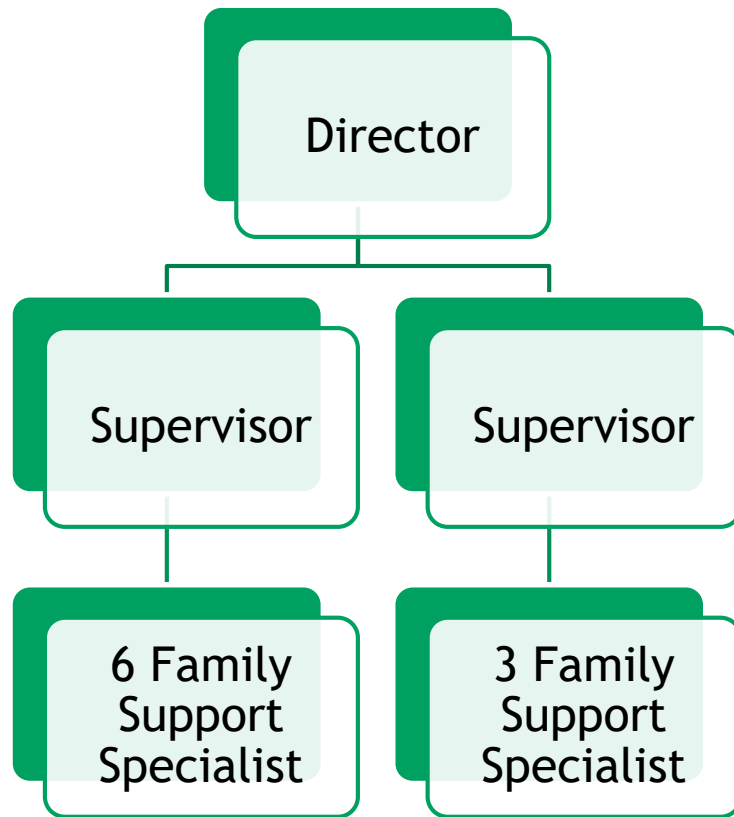


# Program Services



- Child Development Resources
- Referrals to Resources
- Relationship Building
- Parent Support Groups
- Trusted Support
- Maternal and Infant Healthcare
- Family Goal Planning

# Our Diverse Team - Strength in Differences



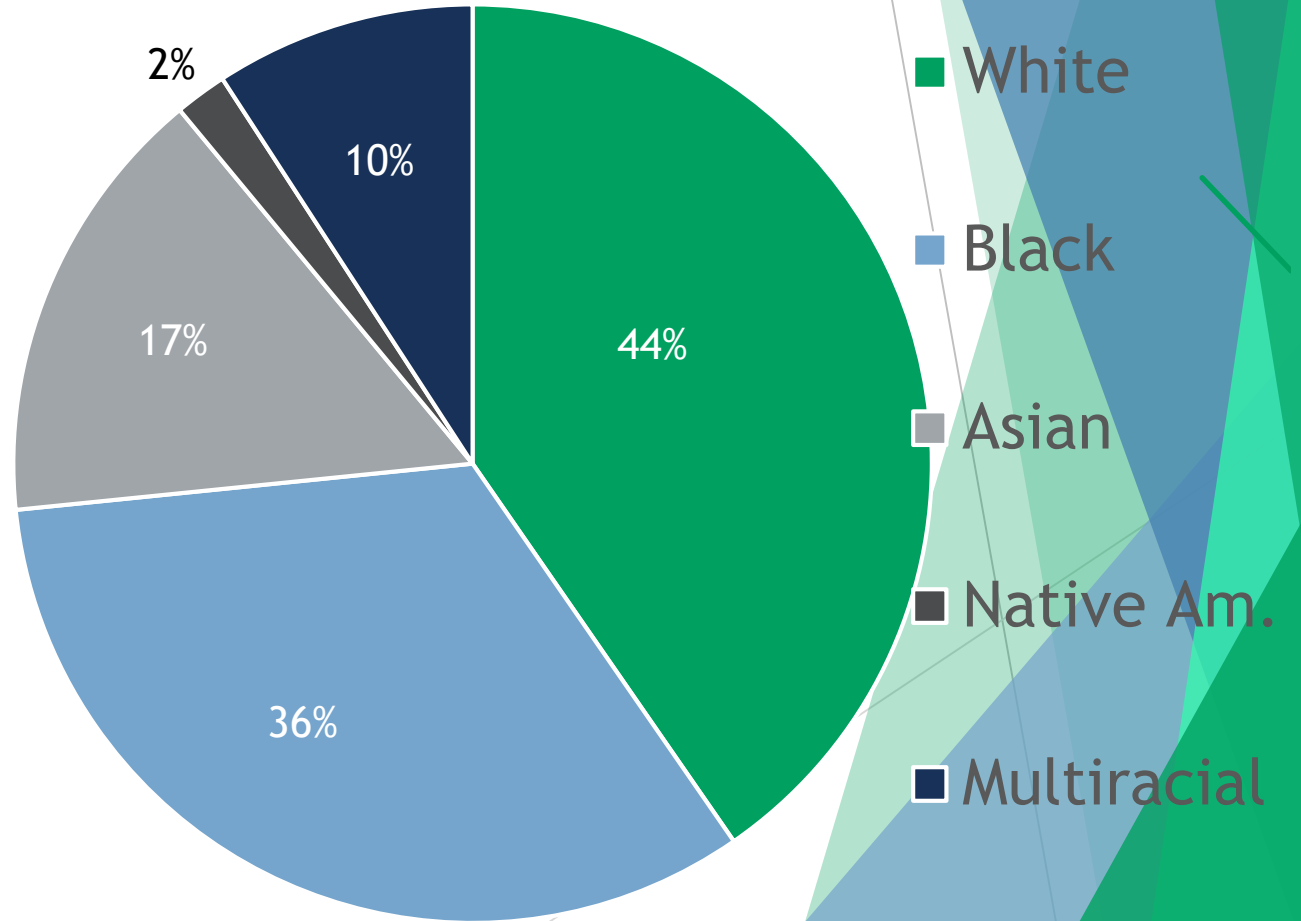
- 62% are Bilingual
- 17% are Hispanic or Other
- 83% are Caucasian
- 100% Female

# Families Served in 2023

- ▶ **2124** Total Home Visits in 2023
- ▶ **126** Total Families Served
- ▶ **120** Target Children with an additional **153** siblings



## Race



## Exciting Outcomes

- 98% of Target children are up to date on well child visits.
- 99% of families received at least one resource and/or follow up service.
  - 503 Community Referrals Provided
- Nearly 83% of families served reported having stayed in services for 3yrs and successfully graduated.
- 93% of participants increased child development and parenting knowledge.



## What's New for FY24

Substance Use Disorder (SUD) Funding through Healthy Moms Healthy Babies!

Partnering with DHHS and Corewell Health to pilot new state-funded program to serve an additional 48 families impacted by SUD.

Expansion of the Team – 1 Supervisor and 3 Home Visitors

# Funding Sources:



- Maternal Infant Early Childhood Home Visiting (MIECHV)
- Kent County Prevention Initiative (KCPI)
- Ready by Five
- American Rescue Plan (ARP)
- Healthy Mom's Healthy Babies
- Children's Trust Michigan

# Questions?

Visit the Healthy Families Kent County page on [familyfutures.org](http://familyfutures.org) to learn more!







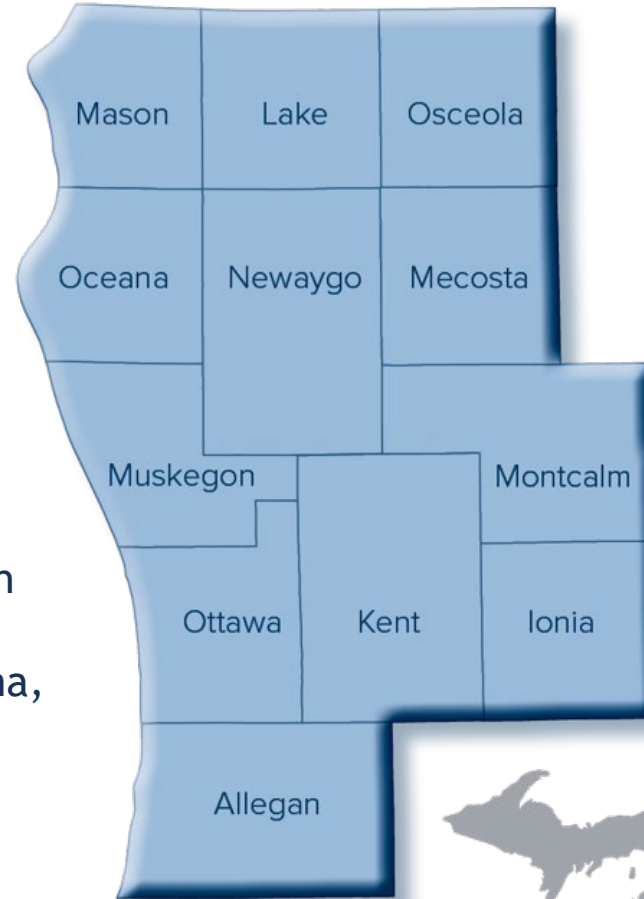
Division Outcomes FY23

# Arbor Circle Service Area

5 physical locations:

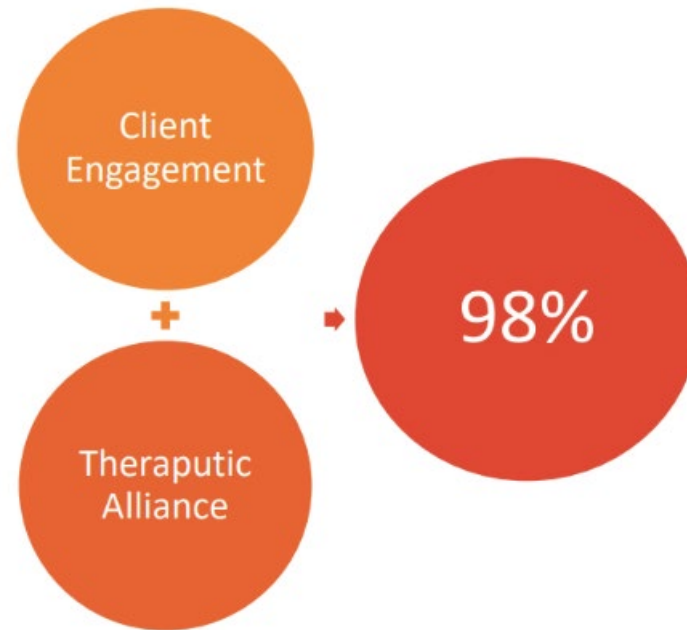
- Allegan
- Kent
- Muskegon
- Newaygo
- Ottawa

In addition, we serve seven additional counties through the Great Start to Quality Program Western Resource Center (Ionia, Lake, Mason, Mecosta, Montcalm, Oceana, and Osceola counties).



# Outpatient Counseling Services

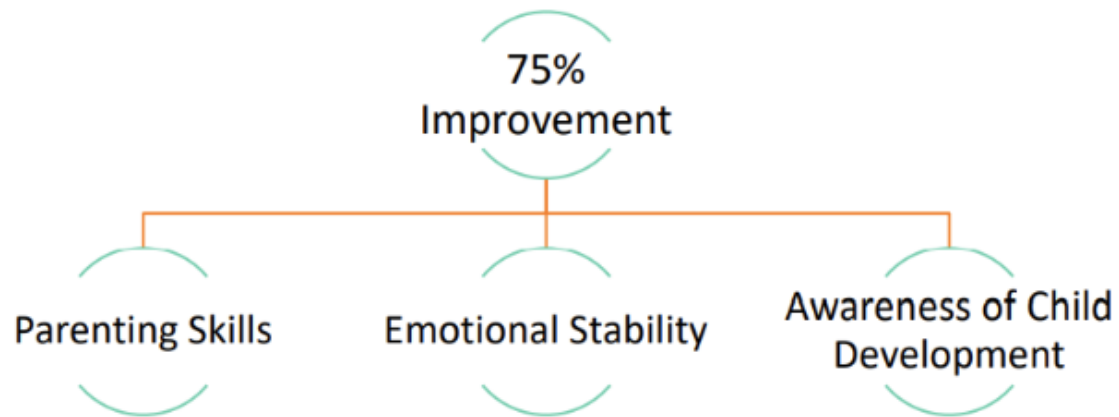
Measurement is clients with more than 3 sessions with consistent progress



Benchmark is 80%

# Early Childhood Services

Measurement is progress in clinical outcome tools



Benchmark is 80%

# Youth Development Services

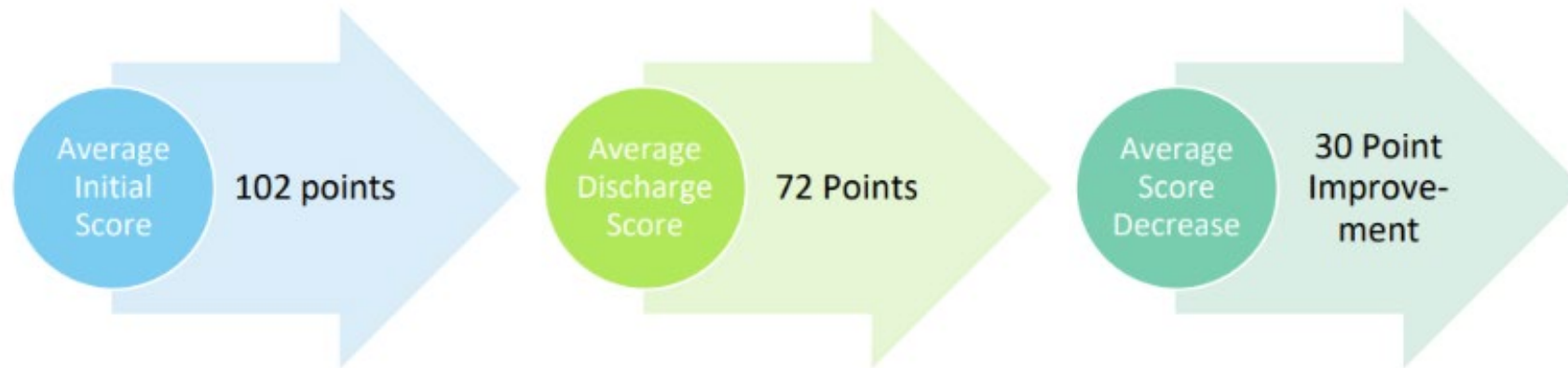
Measurement is youth discharged to a positive and safe housing situation



Benchmark is 85%

# Family Based Services

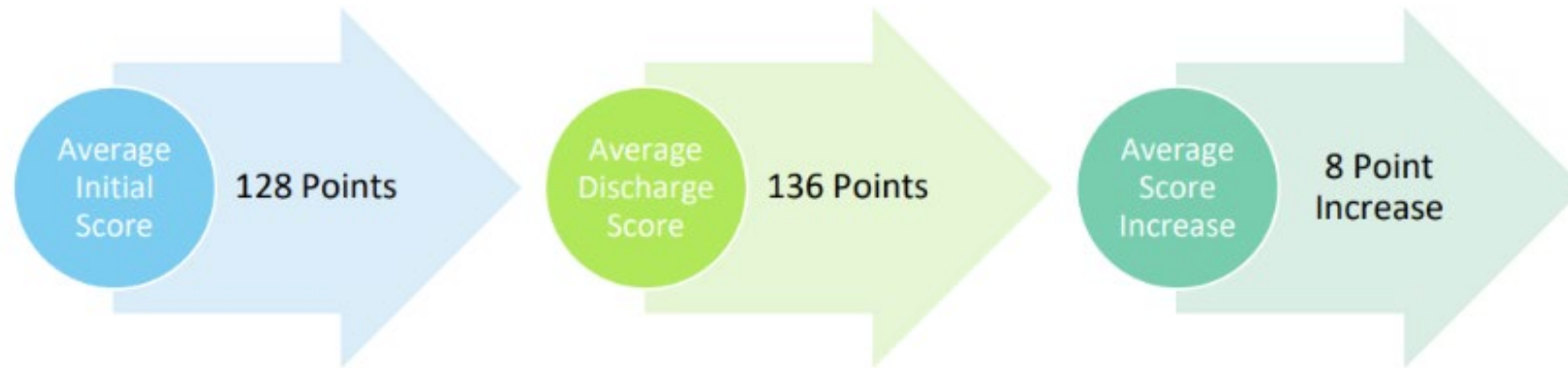
Measurement is progress in clinical outcome tool



Benchmark is 20 point decrease

# Community Based Recovery Services

Measurement is progress in clinical outcome tool



Benchmark is increase of score

# Prevention and Advocacy Services

Measurement is increase of knowledge and skills



Benchmark is increase of 15%



# Child Welfare Services

Measurement child placement and foster care home retention



Benchmark is 80%

Thank you!

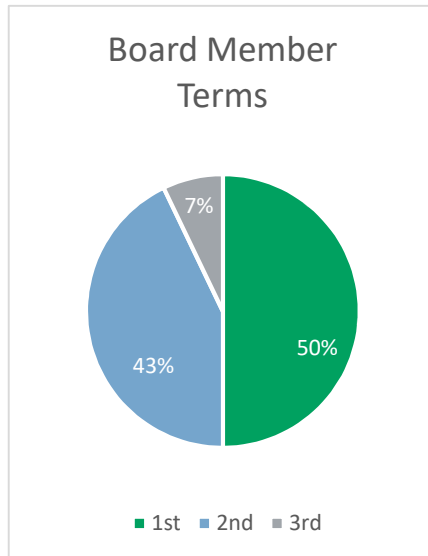
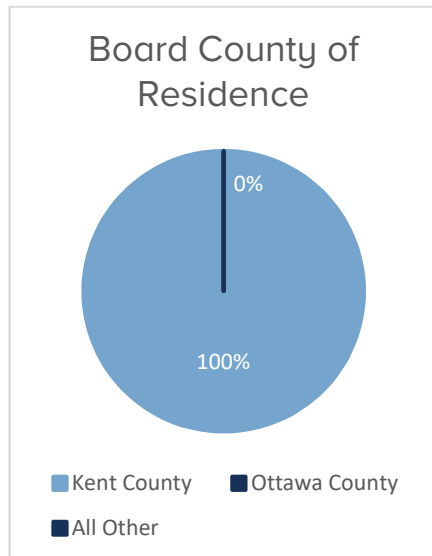
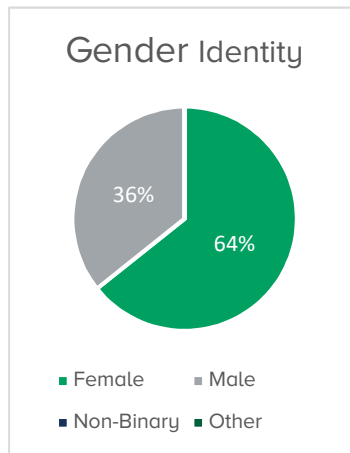
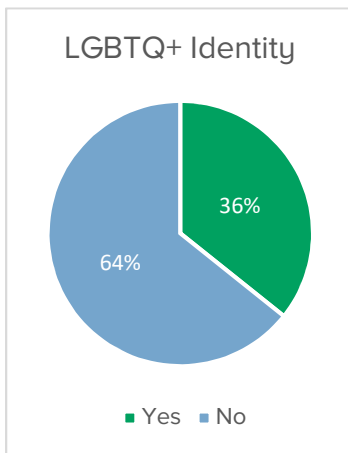
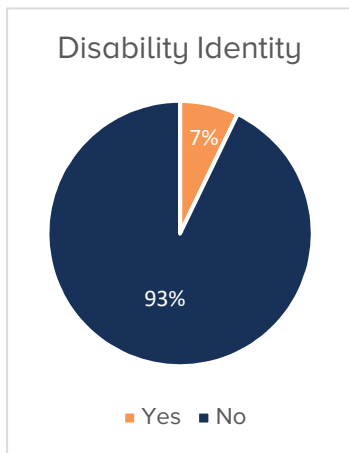
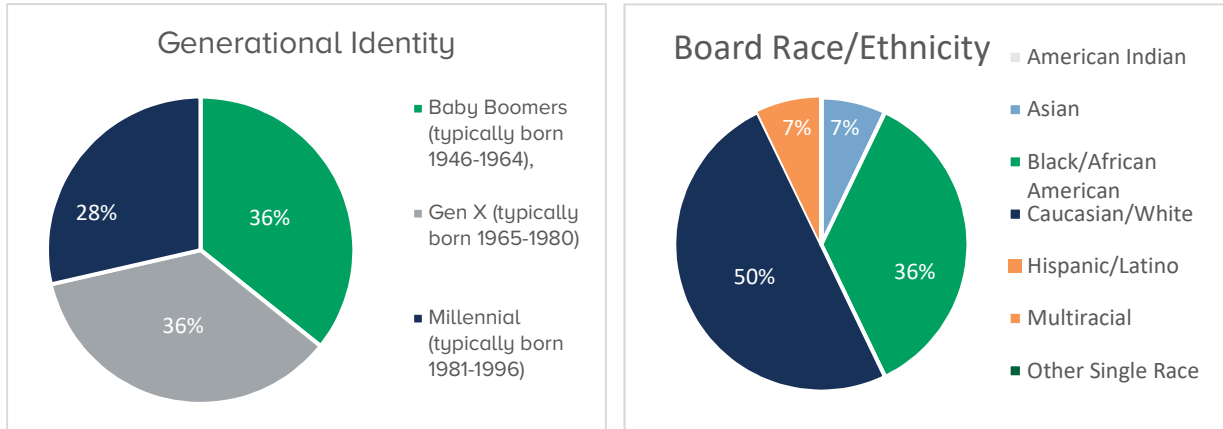
Questions and Answers





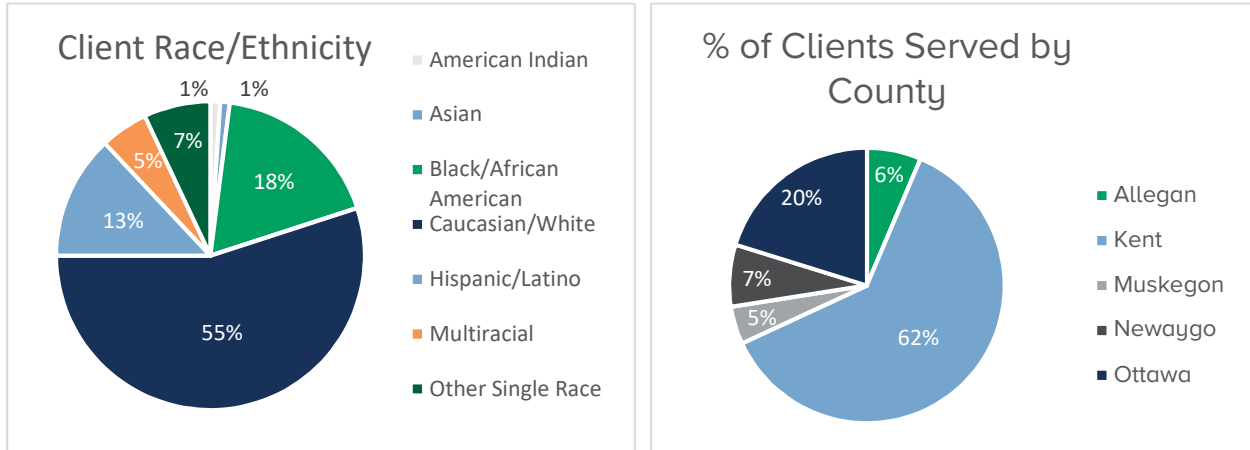
## board profile fy2024

As of December 2023, our Board consists of 14 individuals out of 15 available slots.





## relevant client data



## board sector representation

Current sectors represented include:

- Accounting
- Banking
- Education
- Diversity, Equity & Inclusion
- Faith Community
- Financial Investment/Planning
- Health & Medical
- Human Resources
- Insurance
- Legal
- Marketing
- Public Relations & Communications
- Sales

Board Members also identified skills in the areas of:

- Administration
- Community Engagement
- Cross-Cultural Experience
- Equity & Inclusion work
- Event Planning
- Fundraising
- Legislative Advocacy
- Marketing
- Networking
- Non-profit
- Public Relations
- Public Speaking
- Research & Evaluation
- Training
- Volunteer Management

## Potential Future Board Needs

Sectors not represented include:

- Computers & Tech
- Facilities & Property Management
- Government Relations
- Hospitality
- Industrial & Manufacturing
- Media
- Philanthropy
- Real Estate & Construction



**arbor circle**

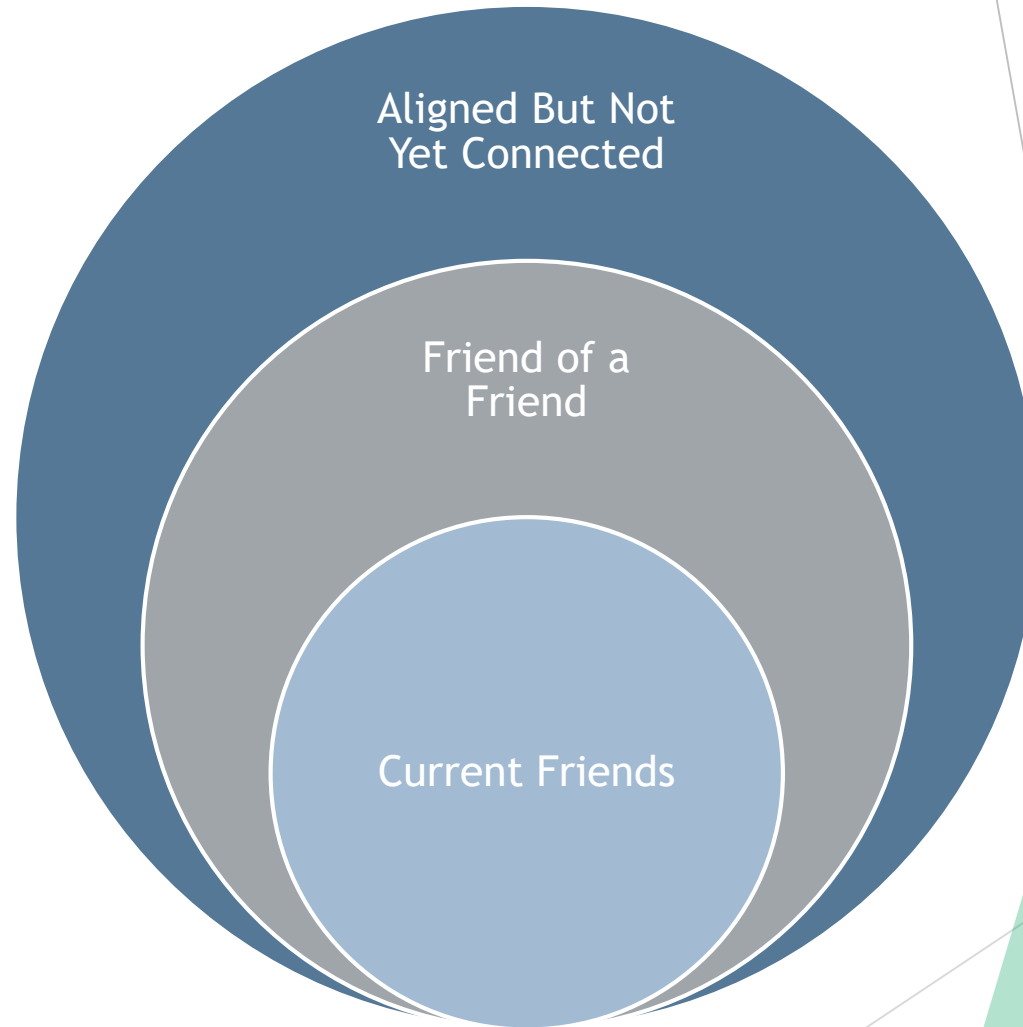
**Making Connections**

# Circles of Connection

The easiest connections to make are with existing partners and friends that are already familiar with the organization.

This exercise will focus on the next two circles – friends of friends and future connections – to expand our audience.

Friend-raising always comes before fundraising. Understanding how someone might be aligned is key to inviting someone to learn more.



# Making Connections

New supporters and friends require significant resources to attract. To effectively cultivate new friends, it's important to leverage existing connections.

One way to do this is to examine how your values and the values of your communities may overlap with the organization.



# Your Connection

**Take time to consider what brought you to Arbor Circle.**

What attracts you to the work of Arbor Circle?

Why have you chosen to support Arbor Circle in the myriad ways that you do as a board member?

What type of contribution feels the most meaningful to you (your time, your talents, your financial giving, or a combination?)





# Connecting the Dots

There are many ways for folks to plug in outside of board membership and financial gifts – and these buckets often overlap!

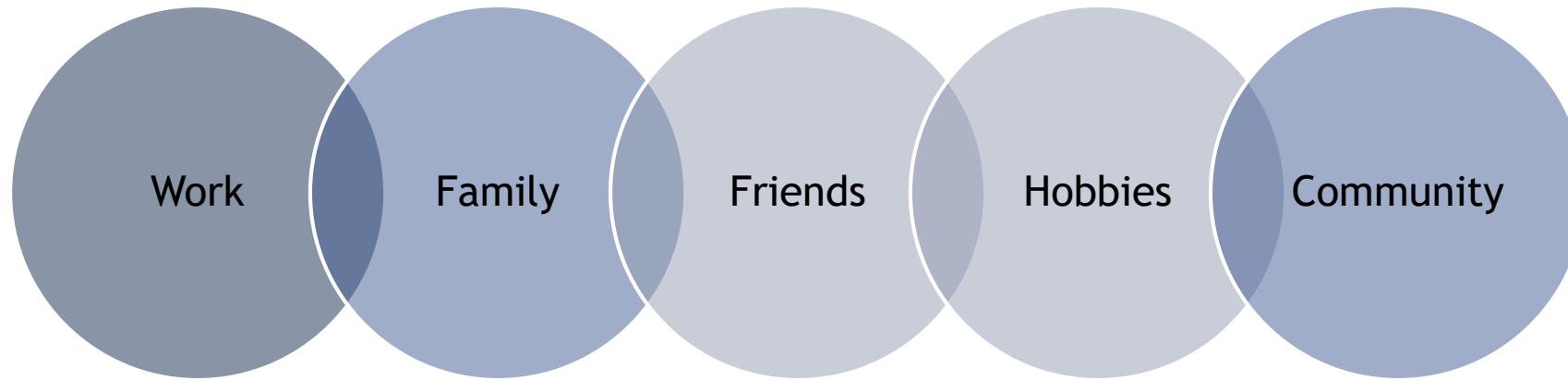
For example:

- 62% of charitable donors are also recent volunteers.\*
- 39% of volunteers support a nonprofit by volunteering before making a financial gift.\*

\*Fidelity Charitable, *The Role of Volunteering in Philanthropy*



# Circles of Connection



Using your own feelings about Arbor Circle as a guide, consider each of the circles above and write down 1-2 names of individuals or organizations that might be interested in learning more about Arbor Circle.



# Circles of Connection

**Bring us up:** If it makes sense in a conversation, share a bit about Arbor Circle and your role as a board member.

**Bring them in:** We love to meet folks! Staff are always happy to provide tours, to have coffee/lunch with new friends, or simply share opportunities with anyone you connect us with.

**Bring us to them:** If you find yourself able to share our opportunities with folks directly (i.e., sponsorship) please do! Opportunities are available on the [Give and Get involved page](#) of our website (of course, you can always email me!). We can also join you at events or other gatherings to help represent Arbor Circle to new groups of folks.

