

**MOACAC Executive Board**  
**Retreat Meeting**  
**June 17-18, 2025**  
**Cedar Creek / New Haven, MO**

**Day 1:**

- I. Welcome
  - a. President (Kelli Roberts) called the meeting to order and began the meeting with introductions asking each board member to introduce themselves, their position on the board and a little bit about themselves.
  - b. Ice Breaker – Kelli initiated vision board exercise and discussion
  
- II. Discussion of Strategic Planning
  - a. Our last strategic plan covered years 2020-2025. A survey was conducted and sent to membership this spring asking to identify key areas of concern and need for improvement/growth.
  - b. After looking at the data, there were 3 pillars that were identified as having room for improvement and attention. These include:
    1. Membership, Engagement, & Collaboration
    2. Impact, Sustainability, & Growth
    3. Advocacy, Access, & Opportunities
  - c. From those three areas, board members participated in breakout sessions to brainstorm initiatives for action steps. From this discussion, a detailed strategic plan will be developed and shared with membership at a future date.
  
- III. Review of Yearly Budget
  - a. The treasurer team (Blake Huster, Christine Holladay, Mary Giunta) reviewed with the new board last year's expenses, overages, and shortages, etc. as well as changes that will be coming to budget allocations for the upcoming year.

Other highlights included:
  - b. There will be a contingency fund established under the president's budget to allow for committee board members to ask for special funds for initiatives that were not part of the original budget plan.
  - c. Tech would like to investigate the possibility of revenue streams from Memberclicks' allowance of ads on our website.

- d. A discussion was had about how we might move forward with establishing renewable scholarships for both IAS and International Initiatives.
- e. We will be earmarking funds to be set aside for NACAC 2027 since we will be hosting in KC that year.

IV. Discussion of 3 Pillars:

1. Membership, Engagement, & Collaboration

1. **Goal Statement:** *MOACAC cultivates a connected, collaborative membership by fostering mentorship, establishing strategic partnerships across the region, and providing meaningful opportunities for leadership and volunteerism. Through intentional outreach, transparent communication, and shared initiatives, we build a strong professional community committed to amplifying ethical and effective post secondary educational access.*

a. Ideas for action

- i. MOACAC presence at regional conferences and meeting, mid-state or outlying area host sites
- ii. Regional support and collaboration
- iii. Resources for members—current directory, list serv, grants for individuals, shareable materials (those with expertise can share resources with others—similar to TpT concept) to avoid recreating the wheel
- iv. Small experience panel/subcommittee to vet safe student for-profit list (gold standard)—trusted sources
- v. Welcome sticker to brand new members
- vi. Federal work study (resources for marketing, tech, etc.)
- vii. MOACAC info at grad certification programs
- viii. Rep at college-hosted luncheon
- ix. Develop & implement for mentorship program
- x. Regular MSCA Conference presence
- xi. More outreach to community-based organizations regarding membership
- xii. Incentivize grants to attend MOACAC event and then return to community and conduct an event

with others in their area to educate others  
(accountability/ROI)

xiii. Tap others for support (CRMs, tech ppl, etc.)

## 2. Impact, Sustainability, & Growth

1. **Goal Statement:** *MOACAC strengthens its long-term impact through strategic financial planning, resource stewardship, and meaningful partnerships. By investing in sustainable funding models, adhering to best practices in compliance and policy, and building a recognizable and trusted brand, we ensure the continued growth and relevance of our work in support of counselors and college admissions professionals across Missouri.*

### a. Ideas for action

- i. Additional committees/leadership (student support, Financial Steering Committee, leadership pipeline)
- ii. Endowments and multi-year scholarships
- iii. Ad hoc finance steering committee
- iv. Compliance including insurance/legal, procedures and policies
- v. Addressing issues of student privacy
- vi. Assign chairs a year prior to the previous chair rolling off so they can observe what the job entails before handing off to the next person
- vii. Co-chair for communications
- viii. Advocacy subcommittee/DC conference, etc.
- ix. Brand recognition – new logo?
- x. Outreach – reverse CUBE (HS present on their schools to colleges)
- xi. Outreach effectiveness
- xii. Take a more proactive approach to responding to government procedures and policies (press statements, etc.)

## 3. Advocacy, Access, & Opportunities

1. **Goal Statement:** *MOACAC provides effective support and communication for counselors and college admissions professionals from varied backgrounds through inclusive programming, accessible resources, and intentional professional development. We aim to cultivate a culture within our organization, in the institutions we serve, and throughout our state that values equity, shared learning, and sustainable support systems.*
  - a. Ideas for action
    - i. Centralization of resources on the website
    - ii. Resources on website-MO-specific resources on website for colleges and universities (virtual visit resources/visit experiences, fly-ins, etc.); listing of HS visits (centralized)
    - iii. Finding the experts to present on topics (Lunch & Learns—expand to include bigger topics)
    - iv. Multi-language resources
    - v. Developing a media kit (clear branding)
    - vi. Metro East/Bootheel
    - vii. Leadership-provide opportunities for advanced leadership to be involved (VP's, CRM's, etc.). Work toward having a higher-level learning component at college
    - viii. Partnering with IACAC for conference?
    - ix. Renewable scholarships
    - x. More intentional collaboration with groups already doing this work
    - xi. Develop successful members competencies (we could determine what a 'competent' college counselor looks like (focus on becoming an expert.)

End of Day 1

**Day 2**

- I. Vote on budget for 2025-26
  - a. Budget unanimously approved by board
- II. Work on finalizing strategic plan details

- a. Ideas under each of the three pillars were assigned 1, 3, 5-year timelines for completion
  - b. The final formal strategic plan will be created and then shared with the board at a later date.
- III. Motivational speaker Anthony Meyers
- IV. General business discussions
- a. Memberships – institutional v individual
  - b. Grants for non-profit organizations for memberships
  - c. Did anyone need full board support for questions, etc. at this time?
    - i. IAS is looking for folks from the KC and rural areas of MO specifically to join their team
    - ii. International Initiatives would like to create a subcommittee of one person to assist and/or train in advance of his rolling off. It would give the chair assistance to provide resources and read scholarship apps, etc. The president encouraged him to pursue that as he see fits.
- V. Closing remarks
- a. Motion to adjourn meeting-Meeting adjourned 11:42AM.

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