

Minutes

ASSET Administrative Team

March 4, 2026 @ 12:15 pm

United Way of Story County @ 315 Clark Ave, Ames, IA 50010

In Attendance: Pa Goldbeck, Linda Hagedorn, Becky Harker, Nick Joos, Sandra King (arrived during Funder Staff Updates), Nolan Klemsrud, Sarah Mansell, Jess Peebler and Ashley Thompson

Virtual: Amy Shaw

The meeting was called to order at 12:17 p.m. by Hagedorn

Approval of February 4, 2026 Minutes

Motion by Joos, seconded by Harker, to correct the year to 2026 and approve the February 4, 2026 ASSET Administrative Team meeting minutes. Motion passed unanimously.

Treasurer's Report

Smith emailed report concluded current balance remains \$2,177.22.

Old Business

Status of SWOT Analyses

The SWOT analysis for ASSET staff will begin immediately following this meeting. Goldbeck reported there is a meeting set for Funders to complete their SWOT analysis on March 26, 2026 at 5:00 p.m. at the United Way of Story County offices. Donna Gilligan suggested to Goldbeck that ASSET agencies be skipped with a possible survey available for general feedback. Thompson agreed that ASSET agency feedback is valued.

New Business

E-CImpact Demonstration – Mary Beth Lawler, Director, Seabrooks and e-CImpact Lawler shared a comprehensive demonstration of the SeaBrooks software platform (e-CImpact), presented as a potential cloud-based, online solution for the ASSET application and recommendation process. Thompson provided context to the group, noting that a few years prior the ASSET Administrative Team also expressed an interest in securing an online solution to better manage the agency budget and volunteer recommendation process. At that time, ASSET engaged with the CyBIZ Lab at Iowa State University to determine if a specific platform could be built for the ASSET process but did not move forward with an option.

The e-CImpact platform is used by hundreds of funders across the United States, including several “ASSET-like”, multi-funder collaborations.

Lawler demonstrated three perspectives of how the platform would be used: ASSET funder staff (administrators), ASSET agencies, and ASSET volunteers. Key capabilities highlighted include:

- A single, cloud-based platform accessible to funder staff, ASSET volunteers, and partner agencies, replacing multiple Excel workbooks and PDF forms.
- Customizable application forms with built-in eligibility criteria, auto-save functionality, and audit trail for all changes.
- Automated email communications with delivery tracking; scheduled deadline reminders sent to agencies and volunteers.
- Agency profile management including IRS EIN verification, document uploads (audits, 990s, financial statements), and contact management with role-based security.
- Budget forms with automatic error-checking (e.g., flagging when totals do not balance), read-only fields that can be locked by funder staff, and built-in calculations.
- Claim/reimbursement (spend-down) reporting with line-item detail and attachment uploads.
- Volunteer review tools including recommendation rubrics, comment fields, and single-source access (by agency) to all required documents (ASSET liaison reports, audits, 990s, ASSET budget forms, and related items).
- Funding letter and agreement management with electronic signature capability.
- Robust reporting and dashboard tools enabling real-time views of funding by impact area, agency, and funder; five- and ten-year funding history generated automatically.
- Event RSVP functionality for trainings and meetings, with calendar integration for funder staff, volunteers and agencies.
- Data archiving for historical records; data import available for existing spreadsheet data.

During the presentation, Harker asked if the software had the capacity to send scheduled notices to agencies when information submission deadlines or upcoming meetings, events or trainings have been scheduled. Lawler confirmed it did. Joos expressed favor towards adopting this technology. Goldbeck expressed that she had watched the demo shortly after Thompson sent it to the Administrative Team on February 5, 2026 and that the City is fully supportive of this investment and believes it will simplify the process for all stakeholders involved. Goldbeck expressed that, as she's stated in the past, the exchange of multiple versions of Excel spreadsheets back and forth is not effective or productive, and the current process is time consuming and prone to many human errors due to the need to reenter numbers repeatedly.

Klemsrud shared that Iowa State University Student Government is in full support of implementing e-CImpact for the upcoming ASSET budget cycle and that the annual costs for the platform have already been built into Student Government's FY 2027 budget, which is scheduled to be approved by the Student Senate that evening.

Harker asked about timing of implementation and if the goal is to get it in place for the next cycle. Thompson explained the timeline needed to implement e-CImpact as communicated by Seabrooks. When asked by Harker if it was feasible to do for the next cycle, Thompson said if that was the desire, a decision would need to be made in the next two months as e-CImpact would need to build, implement and conduct training with ASSET staff prior to launching the platform to ASSET volunteers and agencies at their annual trainings in August 2026.

Motion by Joos, seconded by Harker, to proceed with obtaining a contract from Seabrooks/e-Cimpact for consideration at the April 1, 2026, ASSET Administrative Team meeting. Motion passed unanimously. Thompson indicated she would secure a draft contract from Seabrooks and share with funder staff prior to the April 1, 2026, ASSET Admin Team meeting for consideration and vote.

Funder Staff Updates

ISU Student Government—Nolan Klemsrud

ASSET recommendations will be presented at the March 4, 2026, Senate meeting.

City of Ames—Pa Goldbeck

Goldbeck shared that board members will be appointed by City Council on March 10, 2026. One is Kathy Guillen who is being reappointed for another term and the other is Thomas Stein who will be new to ASSET.

United Way of Story County (UWSC)—Ashley Thompson

All current UWSC ASSET board members will remain. Thompson reported their new major grants initiative; \$100,000 in total funding is available and may be granted to up to three organizations. UWSC will be accepting letters of intent until March 23, 2026. Recipients will be selected by June 2026.

The UWSC Women United breakfast will be held on Friday, March 27 at Sweet Caroline's in downtown Ames. The UWSC Food Drive will be held April 27, 2026, through May 7, 2026, with deliveries to Story County food pantries occurring on Friday, May 8.

Story County—Sandra King

No updates at this time.

ASSET Officer Roles (Chair, Vice Chair, Treasurer)

Chair – Linda Hagedorn

Vice Chair—Liz Zuercher

Treasurer—Ron Smith

Conflict of Interest

Jess Peebler will be sending out forms to ASSET Volunteers for the upcoming ASSET year.

Clear Impact Scorecard

Mansell shared that there will be future updates.

Additional Items/Concerns**Adjournment**

Motion by Joos, seconded by Klemsrud, to adjourn the meeting at 1:57 p.m. Motion passed unanimously.