



**Sisters of St. Joseph of Carondelet**  
*St. Paul Province*  
Ministries Foundation

**Bold Moves for Real Change**

**Ministries Foundation**

**2021-2022**

**Integrated Fund Development Plan**

**July 2021**

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## **I. BACKGROUND**

Board member, Anita S. Ducker, a business consultant, assisted Ralph Scorpio, Executive Director, in developing this plan. The plan reflects input by the Executive Committee, Development Committee and staff.

The plan includes seven sections:

- I. Background
- II. Purpose and Goals
- III. Our Fundraising Planning Foundation
- IV. Our Fundraising Strategies
- V. Our Fundraising Operations
- VI. Our Fund Development Team
- VII. Moving Forward - Track 2

## **CRITICAL ISSUES FACING THE NONPROFIT WORLD**

Especially in this time of the Covid-19 pandemic, the philanthropy world, including foundations, corporate foundations, and corporate and individual donors, is asking more from the nonprofits they fund. They want to see larger-scale impacts, economies of scale, and collaborations with other like-minded organizations.

Donors want to know that their donations are having the highest impact and operations of the ministries as possible. "Accountability," "strategic implementation," and "demonstrated impacts" are more important to donors and funders today than ever before.

There is serious philanthropic competition in the nonprofit world. Individuals have more choices than ever before in where they decide to give. Thus, it is imperative that Ministries Foundation has a well-defined plan that includes accountability in the Ministries Foundation staff doing its job and transparency (acknowledging and addressing deficiencies head-on) in order to build the most resilient base of donors possible.

## **BENEFITS OF THE PLAN**

The key benefits of the planning and adoption of the Integrated Fund Development Plan are to:

- Achieve a shared strategic fundraising framework;
- Achieve a shared understanding of clear roles, responsibilities and deliverables for board members and staff;
- Build trust among the board members, Sisters and consociates, and staff;
- Achieve goal consensus that directs the Ministries Foundation work efforts;
- Maximize effective use of resources; and
- Energize the board and staff that enhances teamwork.

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**II. PURPOSE and GOALS**

**SISTERS OF ST. JOSEPH OF CARONDELET PROVINCE MISSION STATEMENT**  
**[#21 Consitution]**

*The Sisters of St. Joseph of Carondelet move always towards profound love of God and love of neighbor without distinction. Their mission is to continue the mission of Jesus by engaging in works of compassion and mercy that respond to the needs of persons in our times. The expression of these needs varies with the times, cultures, and conditions of persons.*

*Adapted from the Consensus Statement found in the  
Primitive Constitutions and the 2001 Constitution of the  
Sisters of St. Joseph of Carondelet*

- The Sisters of St. Joseph have a 170-year tradition of meeting the needs of the times in our community.
- They continue to be flexible to create ministries to meet new needs as they arise.
- They continue to be flexible and to let go of other ministries when other people can do them better than we can.
- The mission continues because many others hold the charism and embrace the mission.

**MINISTRIES FOUNDATION MISSION**

*The Sisters of St. Joseph of Carondelet Ministries Foundation is a partnership among people who recognize the value of the mission of the Sisters of St. Joseph of Carondelet and seek to make a difference in the lives of those in need by generating and allocating funds to support present and future ministries of the St. Joseph of Carondelet.*

**PURPOSE STATEMENT AND FOCUS**

The purpose of Ministries Foundation's Integrated Fund Development plan is to provide revenue goals and priorities for Fiscal Year 2021- 2022 that support the Ministries Foundation and current CSJ ministries: Learning In Style, Sarah's ... an Oasis for Women, St. Mary's Health Clinics, The St. Joseph Worker Program, and special projects for the CSJ Justice Commission, Wisdom Ways Center for Spirituality, and Hedgerow Initiative.

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**FINANCIAL GOALS**

The revenue goal of 2021-2022 is **\$1,760,000**.

**REVENUE STRATEGY**

The three major revenue strategies including Memorial Gifts and Contract fees will achieve the financial goals.

<b>TYPE</b>	<b>RESTRICTED Funds</b>	<b>UNRESTRICTED Funds</b>	<b>TOTAL</b>	<b>PERCENTAGE</b>
Individual Giving <\$999	\$130,000	\$150,000	\$280,000	16%
Major Gifts> \$1,000 and Family Foundations	\$250,000	\$325,000	\$575,000	32%
Corporate Foundations	\$350,000	\$5,000	\$355,000	20%
Events - Tickets - Donations - Corporate Sponsorships	\$300,000	0	\$300,000	17%
St. Joseph Legacy Society - Endowment Funds	0	\$100,000	\$100,000	6%
Memorial Gifts	\$25,000	\$25,000	\$50,000	3%
Contract Fees	0	\$100,000	\$100,000	6%
<b>TOTAL</b>	<b>\$1,055,000</b>	<b>\$705,000</b>	<b>\$1,760,000</b>	<b>100%</b>

The annual goal will be achieved by successfully executing three fundraising campaigns: Individual Giving, Major Gifts, and Events. The donor base will be expanded by diligently managing the Donor Networking and Expansion program.

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**III. OUR FUNDRAISING PLANNING FOUNDATION**

In order to successfully implement the Three-Year Integrated Fund Development Plan, it is important to understand the major fundraising challenges for the Ministries Foundation.

The following matrix describes the major donor requirements, the challenge in meeting these requirements, and the current status of how well the requirement is being met or not being met.

**Fundraising Challenge/Detraction Perspective Matrix**

<b>Donor's Requirements</b>	<b>Challenge</b>	<b>Meets</b>	<b>Partially Meets</b>	<b>Recommendation</b>
Alignment and shared passion of the unique need the CSJ ministries are fulfilling today.	Educate and promote the CSJ ministries story in a compelling and passionate way.	<i>Bold Moves for Real Change and case statement describe the CSJ ministries in a compelling and passionate story/style.</i>	Social Media	Continue with on-going website updates. Produce a consistent Bold Moves For Real Change publication.
Belief that the CSJ ministries have a sustainable future. Having an active presence that is improving the lives of the marginalized.	Educate the donors, prospects, and the community at large about the CSJ footprint and its sustainability.		<i>Bold Moves For Real Change and case statement describe the CSJ ministries in a compelling and passionate story/style today.</i>	CSJs need to ensure that the mission will continue through ministries into the future.
The need to know that the ministries are well-managed and fiscally responsible.	The need for financial statements of the individual ministries.		Only audited program budgets and audited pages of ministry financials are available.	Remains a challenge.
Need to know that the Ministries Foundation is well-managed and fiscally responsible.	The need for financial statements of the Ministries Foundation.	Guidestar does have the Ministries Foundation 990s. Audited financial statements are available. statements are available.		

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**UNDERSTANDING THE IDEAL PROSPECT**

To be more effective in prospecting, it is important to screen prospects by understanding the Ministries Foundation's ideal donor profile.

In the past, the ideal donor profile looked like:

- Educated by a CSJ Sister
- Attended and/or graduated from St. Catherine University
- Matching interest/passion with a CSJ Ministry
- Family member who has a relationship with the CSJ Sisters/Consociates
- Connected to CSJs through hospitals and St. Mary's clinics (St. Joseph's, St. Mary's, outstate and ND)
- Catholic, former Catholic
- Lives in the Twin Cities
- Former CSJ
- Former donor
- Silent & Greatest or Baby Boomer generation member

Moving forward, the following demographics, the following attributes and desires are more apt to describe a donor of the Ministries Foundation:

- Educated by a CSJ Sister
- Attended and/or graduated from St. Catherine University
- Matching interest/passion with a CSJ Ministry
- Family member who has a relationship with the CSJ Sisters/Consociates
- Consociate
- St. Joseph Worker, family and friends
- Connected to CSJs through the St. Mary's clinics
- Catholic, former Catholic
- Lives in the Twin Cities
- Former CSJ
- Former donor
- Social justice driven

The Ministries Foundation needs to understand the differences between the generations regarding 'giving' and build its future donor base by focusing on the Baby Boomer and Gen X generations. More analysis about how to differentiate between the generations is needed.

**Ministries Foundation Targeted Age Group and Outreach Strategy (Depending on Covid status)**

<b>Generati on</b>	<b>Preference Communication Strategy</b>	<b>Event Strategy</b>
Silent & Greatest	Word of mouth/printed materials	Carondelet Gala- Celebration/Septemberfest
Baby Boomers	Word of mouth/printed materials	Carondelet Gala- Celebration/House Parties
GenX	Social media	Septemberfest/Happy Hours
Millennials	Social media	Septemberfest/Happy Hours

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**SUCCESS MEASUREMENTS**

The results of fundraising activities provided on a timely basis are critical for internal staff, board, and CSJ Leadership. Our success will be measured by the following fundraising key performance metrics.

<i>Gifts from all donors including individuals and organizations, excluding bequests and grants</i>	<b>2018-19 Actual</b>	<b>2019-20 Actual</b>	<b>2020-2021 Goal</b>	<b>2020-2021 Actual</b>
<b>Financial Goal (AF, events, and designations only)</b>	<b>\$955,029</b>	<b>\$1,075,806</b>	<b>\$1,270,000</b>	<b>\$1,003,337</b>
<b>Overall Donor Count</b>	2,007	1,862	2,000	1847
<b>Acquisition/First Time Donor</b>				
<i>First time gift</i>				
<ul style="list-style-type: none"> <li>Number of new donors</li> </ul>	463	366	300	305
<ul style="list-style-type: none"> <li>Dollars raised from new Donors</li> </ul>	\$99,106	\$108,874	\$65,000	\$181,702
<b>Recaptured Donors</b>				
<i>Donors who gave anytime in the past but not the previous fiscal year</i>				
<ul style="list-style-type: none"> <li>Number of recaptured donors</li> </ul>	491	456	200	477
<ul style="list-style-type: none"> <li>Dollars raised from recaptured donors</li> </ul>	\$109,873	\$165,003	\$50,000	\$160,061
<b>First Time Donor Renewals</b>				
<i>NEW donors from last year who gave again this year</i>				
<ul style="list-style-type: none"> <li>Number of new donor renewals</li> </ul>	93	87	70	67
<ul style="list-style-type: none"> <li>Dollars Raised from First Time Donor Renewals</li> </ul>	\$37,494	\$69,646		\$30,436
<b>Repeat Donors</b>				
<i>Donors from last year who gave again this year (inc. new donors)</i>				
<ul style="list-style-type: none"> <li>Number of Repeat Donors (starting FY21, goal is 80% of FY19-20 actual overall donor count)</li> </ul>	1,045	1,016	1375	1052
<ul style="list-style-type: none"> <li>Percent of Goal</li> </ul>				77%
<ul style="list-style-type: none"> <li>Dollars raised from Repeat Donors</li> </ul>	\$799,315	\$910,696		\$659,780
<b>ADDITION CROSS SECTION OF DATA</b>				
<b>Memorial Donors</b>				
<i>Memorial Donors are included in donor counts and revenue (for example, if memorial gift is a first time gift.) Memorial donors who choose to give again become repeat donors.</i>				
<ul style="list-style-type: none"> <li>Number of memorial donors</li> </ul>	207	168		165
<ul style="list-style-type: none"> <li>Dollars raised from memorial donors</li> </ul>	\$14,090	\$16,726		\$19,789
<b>Donor Advised Funds</b>				
<i>DAF are third party entities who administer funds on behalf of the</i>				

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donor. The named fund is credited with the gift, with soft credit being given to the donor.				
• Number of donors giving through DAF	70	81		78
• Dollars raised from DAF	\$87,790	\$120,509		\$74,598
<b>Change in Donor Giving</b>				
<i>Snapshot of all giving categories at fiscal year end</i>				
Number of FY1920 donors upgrading gifts in FY2021	357	335		436
Number of donors whose gifts equal previous gifts	299	307		324
Number of donors decreasing gifts	291	298		1102

**Scorecard Metrics Definitions:**

**Individual Prospects:** An individual who has never given a contribution or has never given to the Annual Fund.

**Solicited Individual Prospects:** A potential donor that has been vetted and solicited.

**New Individual Donor:** An individual that has contributed to any of the ministries, annual fund or events.

**Recaptured Individual Donor:** An individual that did not give last year.

**Repeat Individual Donor:** An individual that has given the past year to any of the ministries, annual fund or events.

**Upgraded Donor:** The number of donors that have given a larger annual total gift than the previous year.

**Failed Solicitation:** A customized ask at the \$500 or more level that was declined.

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The following charts is a snapshot of the Ministries Foundation last year’s donor base.

**2020-2021 Donor Base**

<b>Breakdown</b>	<b>Total Donors</b>	<b>Unrestricted Funds</b>	<b>Designated Funds</b>	<b>Total Revenue*</b>	<b>Percentage</b>
\$10,000+	12	138,417	98,198	236,614	24%
\$5,000 - \$9,999	23	80,969	49,417	130,386	13%
\$2,500 - \$4,999	53	70,063	87,240	157,303	16%
\$1,000 - \$2,499	153	109,795	82,004	191,799	20%
\$500 - \$999	174	56,149	42,524	98,673	10%
\$100 - \$499	785	100,123	38,743	138,866	14%
\$99 and under	598	18,939	5,438	24,378	3%
<b>Total</b>	<b>1,798</b>	<b>\$574,455</b>	<b>\$403,564</b>	<b>\$978,019</b>	<b>100%</b>

***\*Does not include grants, estate gifts and contract fees.***

**IV. OUR FUNDRAISING STRATEGIES**

Ministries Foundation will increase its fund development by effectively implementing the following five key fundraising strategies:

**1. Fundraising Strategy - Building the Individual Donor Base**

- Identify new prospects by successfully implementing the Donor Networking and Prospect Expansion Program.
- Identify current individual donors who are giving at the \$500 level and have the capacity to give at a higher level.
- Identify potential donors that have the capacity to give \$500 or more annually.
- Develop donor account plans for donors of \$1,000 or more.
- Develop a targeted campaign that encourages Consociates to give.
- Develop a targeted campaign that encourages the St. Joseph Workers' network to give.

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**2. Fundraising Strategy - Building the Institutional DonorBase**

- Build and maintain a sustainable institutional donor base by identifying Christian family foundations that are focused on the CSJ Ministries missions.

**3. Fundraising Strategy - Building the Sponsorship Base**

- Build and maintain a corporate sponsorship base by identifying like-minded corporations that desire to be a partner with the CSJ Ministries.

**4. Fundraising Strategy - Building the Legacy Society**

- Build and maintain the St. Joseph's Legacy Society by ensuring that all size donors and others are aware of the legacy program.

**5. Fundraising Strategy - Capitalizing on Key Memorial Gifts**

- Recommendation: Evaluate the current Memorial Gift policy that doesn't allow the Ministries Foundation to contact the people who donated through a Memorial Gift.
- Maintain a relationship with the family that asked gifts be given to the Ministries Foundation on behalf of one of their loved ones.

For the first three fundraising strategies, a more detailed Action Campaign Plan e.g., working plan are in the appendices. Each Action Campaign Plan includes a fiscal year goal, metric (s), description, attraction strategy - key tactics, retention strategy- key tactics, primary responsible person, other team members, and other resource requirements, if required

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## **V. OUR FUNDRAISING OPERATIONS**

For each one of the fundraising strategies to be successful, the following must in place:

### **COMMUNICATION STRATEGY**

- All of the fundraising campaigns must be supported by an effective communications strategy that builds the Ministries Foundation brand in the following communication mediums: *Bold Moves for Real Change* annual publication, website, fundraising communication materials, and social media including Facebook, Twitter, You Tube, and LinkedIn. Key messages and images must be coordinated and aligned with all mediums.
- Recommendation: A *Bold Moves for Real Change* newsletter update to be developed and mailed four times a year.
- Recommendation: A mobile function to be added to the Ministries Foundation's website.
- Recommendation: A one page *How to Ask* script to be developed and utilized by Board members and staff.
- Recommendations from the Foundation Transformation Plan: (*See the Transformation Plan for detail and tactics.*)
  - 1. Tell the Story of the Sisters of St. Joseph's Mission and Ministry, the Past, the Present and our Focus on the Future.**
  - 2. Help Build a Unified Sisters of St. Joseph Brand.**
  - 3. Invest Boldly and Advertise Boldly**
  - 4. Strengthen our internal and external networks and expand our reach.**
  - 5. Recognize our Donors and Volunteers**
  - 6. Amplify our Gifting Opportunities**

### **INFORMATION STRATEGY**

- Another critical element is that the donor information is kept current, accurate and comprehensive. Maintaining data integrity in Raiser's Edge, the donor account management system, is vital.

### **HUMAN RESOURCE STRATEGY**

- Recommendation: Review all Ministries Foundation's job descriptions to ensure that they are updated, if required; clearly identifying the role and responsibilities of each staff member's role and deliverables, and how staff works as a team.
- Recommendation: Review Ministries Foundation's compensation policy that aligns with the job expectations and deliverables.
- Recommendation: Review individual professional development plans to ensure they reflect the skills, attributes, and resources that are required to ensure a successful fundraising effort.

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**OPTIMAL BOARD STRUCTURE STRATEGY**

To help design a more effective Board Development Committee, the Board will:

- Recommendation: Re-establish a strong Development Committee that will meet at least six times/year and will include additional committee members who are not board members.
- This committee will review, oversee and strategize staff development work (Annual Fund, grant writing, major gifts solicitation, planned giving, etc.) as well as board member donor recruitment and solicitation work.
- Recommendation: Development Committee to meet no less than six times a year.

**CULTIVATING AND RETAINING DONORS STRATEGY**

Time and resources are limited and thus there needs to be different levels of donor account planning - ensuring that most of the fundraising effort is being dedicated at the appropriate level.

It is important that a well-defined Donor Cultivation plan is developed and effectively managed.

There will be three "Touch Point" plans: 1) less than \$499, 2) \$500 - \$999, and 3) \$1,000 plus for current donors and prospects.

**The "Full Court Press" -- Touch Point plan for Major Gifts \$1,000 or more**

- Current contact information
- Past or current donor (Relationship to Sister, former Sister, Board Member, former board member, Staff, Consociates, St. Joseph Workers, or current CSJ employees)
- Assessment of donor's capacity level of giving - can it be increased, e.g. evaluation and development of a new ASK strategy
- One-on-one visit(s)
- Ministry tour(s)
- Event(s) participation [Septemberfest, Carondelet Gala]
- Telephone call(s)
- Email(s)
- Birthday acknowledgement
- Customized solicitation letter (Level of Ask) Fall, Spring, Christmas Appeals, Give to the MAX Day
- St. Joseph Day card
- Gift acknowledgement letter (gift level received)
- St. Joseph Society Legacy
- Email Appeals
- Failed solicitation and reason, if known.

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**\$500 - \$999 "Touch Point" plan includes:**

- Current contact information
- Past or current donor (Relationship to Sister, former Sister, Board Member, former board member, Staff, Consociates, St. Joseph Workers, or current CSJ employees)
- Assessment of donor's capacity level of giving - can it be increased, e.g. evaluation and development of a new ASK strategy
- One-on-one visit(s)
- Ministry tour(s)
- Event(s) participation [Septemberfest, Carondelet Gala]
- Telephone call(s)
- Email(s)
- Birthday acknowledgement
- Customized solicitation letter (Level of Ask) Fall, Spring, Christmas Appeals, Give to the MAX Day
- St. Joseph Day card
- Gift acknowledgement letter (gift level received)
- St. Joseph Society Legacy
- Email Appeals
- Failed solicitation and reason, if known.

**Less than \$500 "Touch Point" plan includes:**

- Current contact information
- Past or current donor (Relationship to Sister, former Sister, Board Member, former board member, Staff, Consociates, St. Joseph Workers, or current CSJ employees)
- Only if requested - Ministry tour(s)
- Event(s) participation [Beer Garden, Carondelet Gala]
- Customized solicitation letter (Level of Ask) Fall, Spring, Christmas Appeals, Give to the MAX Day
- Gift acknowledgement letter (gift level received)
- St. Joseph Society Legacy
- Email Appeals
- Failed solicitation and reason, if known.

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**PROSPECTING AND MAINTAINING DONOR STRATEGY**

To be successful in prospecting and maintaining the relationship, the following disciplined approach requires that each staff member person have a regular schedule for prospecting (daily or X number of set days and hours committed with no excuses or exceptions).

A successful fundraising effort is based on managing a well-defined process of work. Below is a Seven-Step Process that outlines the major tasks in each step sub-process.

**1. Prospect Identification: *Expanding the Donor Base***

Identify prospects and connections by receiving referrals from: board members, former board members, staff, Sisters and former Sisters', Consociates, St. Joseph Workers, and event attendees.

**2. Prospect Information Gathering: *Learning about the Prospect***

Develop donor information through researching public databases for signs of wealth, generosity and affinity. This information can help evaluate an individual's ability to make a donation and the likelihood of them doing so.

**3. Screening and Evaluation: *Qualifying the Prospect***

Conduct individual review of prospect lists for assessment of wealth, inclination, and capacity to give.

**4. Cultivation: *Building the Relationship***

Assign the prospect to the right staff member (executive director, development officer, or grant writer) and to a board member. Develop and implement the appropriate level donor account plan.

**5. Solicitation: *The Ask***

Decide what is the best method and time to reach the prospect; set up the meeting.

There is a higher degree of success if two people are part of the Major Gift ASKs - appropriate staff member, board member and/or CSJ Sister/Consociate.

Be prepared to act quickly to accept a gift and thank the donor. If the response is 'no,' have a contingency plan where you might be able to turn a 'no' into a 'maybe' or 'not now.' Maintain a channel of communication with a prospect that allows Ministries Foundation to approach the potential donor again in the future with other opportunities.

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**6. Stewardship: *Recognition and On-Going Engagement with Donors***

Stewardship is all about maintaining and evolving long-term relationships with donors. Effective stewardship ensures that the donor knows her or his gift is being valued and put to good use. The gift needs to be appropriately recognized and will ideally engage the donor so that she or he feels even more positive about the ministry.

**7. Tracking and Reporting: *Critical to the Overall Success***

Track and report on prospect and donor activities. Maintain the data integrity of donor information in Raiser's Edge by keeping the information current including contact information and all the touch points that are done by staff.

**VI. OUR FUND DEVELOPMENT TEAM**

For an organization to be successful in fundraising, both the staff and board need to be fully engaged. The Ministries Foundation must also recognize that it cannot do it alone. It is critical that other CSJ affiliated groups participate and be a part of the overall fundraising effort.

**STAFF**

The roles and responsibilities of the Fund Development Team (all staff) are clearly articulated and managed.

The Executive Director is responsible for all individual donors of \$2,500 plus including the flagship sponsors for the Carondelet Gala. [150 donor account plans; 30 account plans for St. Joseph Society members]

The Development Officer - Annual Fund/Digital Fundraising is responsible for coordinating and executing our Annual Fund and helping bring it into the digital age. This position will also develop relationships with individual donors at the \$500 - \$2,499 level including the non-flagship sponsors for fundraising events. Conducts ministry tours. [100 donor account plans for individual donors, \$500 - \$1,000; 200 research reports for new sponsorship prospects; 30 donor account plans on new sponsorship prospects]

The Development Officer – Grants is responsible for government, corporate, and foundation grant writing. [50-60 grant proposals; 5 new grant proposals]

The Development Associate is responsible for the integrity of the database, gift entry and acknowledgement. In addition, the position is the chief prospect researcher and technology manager. Responsible for \$499 or less donors.

The Office and Communications Officer is responsible social media and event photography as well as purchasing, supporting the executive director, staff, and board.

Recommendation: All staff members are responsible for developing and maintaining donor relations at an appropriate level.

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## **BOARD OF DIRECTORS**

Board of Directors' commitments are essential for the Ministries Foundation fundraising efforts that include:

- Direct personal involvement in fundraising activities, including a commitment to identify, call on and cultivate individual, corporate and organizational prospects;
- Full participation in planning and attendance of fundraising events; and
- Willingness to be a "connector" and champion for the Ministries Foundation in articulating the vision and mission and in helping to generate excitement and support for the work of the CSJ Ministries and Ministries Foundation.

Each board member is responsible for helping to expand the donor base by providing prospect leads (family, friends, colleagues) and to introduce and make at least one-on-one visit with the executive director/development officer annually.

## **SISTERS OF ST. JOSEPH ROLE**

Key CSJ Sisters' commitment are critical in the fundraising effort and will include the following commitments:

- Identify five to ten CSJs who are willing to be actively involved in fundraising;
- Direct personal involvement in fundraising activities, including a commitment to identify, call on and cultivate friends and family prospects;
- Attend fundraising events; and
- Willingness to be a "connector" and champion for the Ministries Foundation in articulating the vision and mission and in helping to generate excitement and support for the work of the CSJ Ministries and Ministries Foundation.

## **OTHER AFFILIATIONS**

### **CSJ Consociates' Role**

The CSJ Consociates' commitment is also important and will include the following requests:

- Identify prospects by providing family, friends and colleagues contact information;
- Attend fundraising events; and
- Willingness to be a "connector" and champion for the Ministries Foundation in articulating the vision and mission and in helping to generate excitement and support for the work of the CSJ Ministries and Ministries Foundation.

### **St. Joseph Workers' Role**

The St. Joseph Workers play a critical role in reaching the Gen X and Millennial generations. They represent an important part of the CSJ future, and will include the following requests:

- Identify prospects by providing family, friends and colleagues contact information;
- Attend fundraising events; and
- Willingness to be a "connector" and champion for the Ministries Foundation in articulating the vision and mission and in helping to generate excitement and support for the work of the CSJ Ministries and Ministries Foundation.

**Ministries Foundation**  
**2021-2022 Integrated Fund Development Plan -Working Document**  
**Track I: *BOLD MOVES FOR REAL CHANGE***

## **VII. MOVING FORWARD - TRACK2**

The Ministries Foundation is committed to a robust fund development strategy and comprehensive fundraising plan. The Board is committed to a broader engagement strategy and building a governance structure that supports this plan. To enhance accountability, the implementation of performance measurements and reporting will be on-going.

Depending on the decision of the CSJs about a new organizational model of ministries as a result of the Bold Moves 2030 assessment study of the Province ministries, the Ministries Foundation may vote to begin planning for a possible major Capital Campaign. A campaign would have two phases: the Quiet Phase and the Public Phase.

**Recommendation:** If and when appropriate, the Ministries Foundation Board of Directors will appoint a Tract 2 Capital Campaign Planning Committee of no more than ten members. The committee will identify, assess and determine what capacity-building blocks are required before the Quiet Phase of the campaign can be launched.

A capital campaign plan includes but not limited to: a case statement e.g., rationale for the campaign that is driven by the CSJs, a marketing plan, a public relations plan, and an comprehensive donor engagement strategy.

Recommendation: Develop a social media plan that effectively supports the public phase of the capital campaign that may include:

- Education
- Prospect development including prospect identification and prospect research
- Events, engagement and cultivation, email and online campaigns
- Marketing and public relations