

Sisters of St. Joseph Ministries Foundation, St. Paul Province
2021-2022 Development Committee Action Plan

I. Strategic Initiative: Acquisition

Action	Responsible Party	Timeframe	Success Criteria	Status
<p>Discuss ways to identify potential new donors by providing volunteer or service opportunities. Example - utilizing contacts with community partnerships, higher education, and private high schools.</p>	<p>Staff and Committee</p>	<p>Ongoing</p>	<p>Documented numbers of donors related to volunteer participation.</p>	
<p>Look at potential donor groups that are aligned with the CSJs and evaluate how best to reach out to their members and donors. (Consociates, SJWs former board members, former CSJ women)</p>	<p>Alyssa, Ralph and Committee</p>	<p>Ongoing</p>	<p>Segment these groups to receive a specific solicitation which will be designed for them and mail or e-mail it. Number of new donors who respond.</p>	
<p>Pursue acquisition strategies such as lists purchases, crowdfunding and social media fundraising campaigns. Utilize the WBO list that was purchased.</p>	<p>Alyssa, Ralph, Gabi, and Kris</p>	<p>Fall, it had been put aside to wait for the Sisters to vote on their next path into the future, however we only have the list for a year, so it has to be completed by year end of 2021.</p>	<p>Piece/letter designed and number of responses.</p>	
<p>For new memorial gift donors – contact each one with a letter on the first anniversary of their original memorial gift inviting them to make another memorial gift. If a second gift is sent, this donor will be added to the list as a new donor.</p>	<p>Alyssa</p>	<p>Start keeping track in 2021-2022 and then start notifying the donors on the one-year anniversary in 2022-2023.</p>	<p>Will start keeping success statistics next year.</p>	

Work with Board to identify at least 2 new prospects each.	Ralph, Kris and Board	On going	Face to face meetings with 20 new prospects by staff and BOD members.	
Pilot Gen Z and Millennial engagement campaign	Alyssa	February 2022	Launch efforts to attract younger donors by developing and delivering messages through platforms that resonate with their lifestyle.	Coordinate with the Marketing Committee.

II. Strategic Initiative: Retention

Action	Responsible Party	Timeframe	Success Criteria	Status
Regularly review managed lists to keep A level prospects inline of sight and rebalance pools accordingly.	Committee reviews, Ralph will report on metrics.	Bi-monthly review of portfolios.	More donors giving annually better list segmentation in a tiered pool.	
Document cultivations and donor actions in RE.	Ralph	Monthly check in.	Documented increase contacts	
Board and Committee to make acknowledgement calls	Board and Committee; coordinate with Alyssa	To be discussed		
Audit all fundraising methods and then implement into the annual fund using a variety of pieces and messages, including different mailings for specific segments. Integrate the Marketing Committee to produce a high-quality piece.	Development Committee and Staff	On going	Increased number of donors.	
Conduct wealth enhancement or overlays to better target high-capacity high affinity donors.	Staff – will report to Committee.		Rebalance managed portfolios, accordingly.	

Invite former Board members back to an event to update them on Bold Moves 2030.	Ralph and Kris	As soon as a decision has been voted on by the Sisters.		
---	----------------	---	--	--