



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

Bold Moves for Real Change

Ministries Foundation

2016-2019 Integrated Fund Development Plan

Working Document

July 2018

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I. BACKGROUND

The Ministries Foundation is at a point in its history when it would greatly benefit by developing an integrated fund development plan to guide its fundraising efforts in the coming years. Board member, Anita S. Ducker, a business consultant, offered to assist Ralph Scorpio, Executive Director, and Paul Tatro, Development Officer, to develop 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

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 Three-Year 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 [#21Consitution]

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 165-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 2016- 2019 that supports the 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 2018-2019 is **\$1,766,000**.

REVENUE STRATEGY

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

TYPE	RESTRICTED Funds	UNRESTRICTED Funds	TOTAL	PERCENTAGE
Individual Giving < \$999	\$130,000	\$185,000	\$315,000	18%
Major Gifts> \$1,000 and Family Foundations	\$235,000	\$375,000	\$610,000	35%
Corporate Foundations	\$300,000	\$25,000	\$325,000	18%
Events - Tickets - Donations - Corporate Sponsorships	\$360,000	0	\$360,000	20%
St. Joseph Legacy Society - Endowment Funds	0	0	0	0
Memorial Gifts	\$25,000	\$25,000	\$50,000	3%
Contract Fees	0	\$106,000	\$106,000	6%
TOTAL	\$1,050,000	\$716,000	\$1,766,000	100%

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 what are 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/Detractor Perspective Matrix

Donor's Requirements	Challenge	Meets	Partially Meets	Recommendation
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</i> and case statement describe the CSJ ministries in a compelling and passionate story/style.	Social Media	Continue with on-going website updates. Develop a second <i>Bold Moves For Real Change</i> 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</i> and case statement describe the CSJ ministries in a compelling and passionate story/style today.	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.		

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UNDERSTANDING THE IDEAL PROSPECT

To be more effective in prospecting, it is important to screen prospects by understanding what is 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

Generation	Preference Communication Strategy	Event Strategy
Silent & Greatest	Word of mouth/printed materials	Carondelet Gala/Septemberfest
Baby Boomers	Word of mouth/printed materials	Carondelet Gala/House Parties
GenX	Social media	Septemberfest/Happy Hours
Millennials	Social media	Septemberfest/Happy Hours

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SUCCESS MEASUREMENTS

For the plan to be successful, it is important that the fundraising efforts are tracked, measured, and reported. 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.

	2018-19 Goal	YTD Actual 2018-19	2017-18 Actual	2016-17 Actual
Financial Goal	\$1,766,000		\$1,840,063	\$1,611,224
Donors	2,200		1,982	2,288
Prospecting Individual				
• Number of prospects	325		325	212
• Number of prospects solicited	200		200	165
New and Recaptured Individual Donors				
• Number of new donors	425		417	308
• Dollars raised from new Donors	\$75,000		\$47,282	\$67,570
• Number of recaptured donors	220		317	206
• Dollars raised from recaptured donors	\$45,000		\$30,158	\$39,909
New Individual Donor Renewals (renewing after first gift)				
• Number of new donor renewals	85		81	64
• Percent of Goal			95%	80%
Repeat Individual Donors				
• Number of Repeat Donors	1250		1,166	1,070
• Percent of Goal			93%	89%
• Dollars raised from Repeat Donors	\$950,000		\$928,669	\$1,114,343
Upgraded Donors				
• Number of donors upgrading gifts	450		344	468
• Percent of Goal			76%	117%
Institutional - Family Foundation Donors				
• Number of repeat donors	9		12	7
• Dollars raised from repeat grant funders			\$354,033	
• Number of new prospects	2		2	1
• Dollars raised by from new prospects	\$5,000		\$15,000	\$3,000
Events - Corporate Sponsorships				
• Number of sponsorship requests submitted	165		289	135
• Dollars raised from repeat sponsors	\$120,000		\$122,528	\$114,975
• Dollars raised from new sponsors	\$25,000		\$15,500	\$5,800
Failed Solicitations				
• Number of failed solicitations ("not now")			12	20
• Number of failed solicitations ("not ever")			2	5

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Below defines the Scorecard metrics:

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 \$1,000 or more level.

The following charts are snapshots of the Ministries Foundation past two years' donor base.

2016-2017 Donor Base

Breakdown	Total Donors	Total Revenue*	Percentage	Designated Funds	Unrestricted Funds
\$10,000+	14	\$233,031	23%	\$201,044	\$31,897
\$5,000 - \$9,999	33	\$190,762	19%	\$94,457	\$96,305
\$2,500 - \$4,999	39	\$120,131	12%	\$74,218	\$45,913
\$1,000 - \$2,499	149	\$187,324	18%	\$107,258	\$80,066
\$500 - \$999	166	\$95,892	9%	\$55,827	\$40,065
\$100 - \$499	870	\$147,645	15%	\$68,016	\$79,629
\$99 and under	1003	\$39,309	4%	\$16,752	\$22,557
Total FY 2015-2016	2,274	\$1,014,094	100%	\$617,572	\$396,522

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

2017-2018 Donor Base

Breakdown	Total Donors	Total Revenue*	Percentage	Designated Funds	Unrestricted Funds
\$10,000+	12	192,836	21%	129,656	63,180
\$5,000 - \$9,999	30	159,315	17%	64,543	94,772
\$2,500 - \$4,999	34	100,526	11%	65,458	35,068
\$1,000 - \$2,499	166	206,568	23%	110,551	96,017
\$500-\$999	167	91,824	10%	49,201	42,623
\$100-\$499	754	131,518	14%	54,083	77,435
\$99 and under	813	31,340	4%	8,875	22,465
Total FY 2016-2017	1,976	\$913,927	100%	\$482,367	\$431,560

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

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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.

2. Fundraising Strategy - Building the Institutional Donor Base

- 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.

Appendix A: Individual Giving

Appendix B: Major Gifts

Appendix C: Events

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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* one-pager 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.

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.

OPTIMAL BOARD STRUCTURE STRATEGY

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

- Recommendation: Establish two development sub-committees of the Development Committee: Major Gifts and Events/Sponsorships. Appoint a chair for each one of the two board development sub-committees with no more than five board members on each sub-committee. The sub-committees will be staffed by the appropriate staff member.
- Recommendation: Ask the development sub-committee co-chairs to meet bi-monthly, if required, to coordinate fundraising efforts.

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- Recommendation: Development Committee to meet no more than four 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.

Below describes the 'full court press' - "Touch Point" plan for Major Gifts of \$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.

/ \$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.

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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.

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.

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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. [100 donor account plans; 30 account plans for St. Joseph Society members]

The Development Officer - Annual Fund is responsible for individual donors, family foundations, 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 Senior Development Officer is responsible for government, corporate, and foundation grant writing. [25 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.

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.

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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.

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VII. MOVING FORWARD - TRACK 2

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.

Planning for the major Capital Campaign, Tract 2 will begin TBD. The campaign will have two phases: the Quiet Phase and the Public Phase.

Recommendation: The 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