



DRAFT 6

**SISTERS OF ST. JOSEPH OF CARONDELET
MINISTRIES FOUNDATION
2019-2020 OPERATION PLAN
May 26, 2019**

EXECUTIVE SUMMARY:

The staff and Board of Directors in 2019-20 will focus on five main areas:

1. Extending/continuing the Integrated Fund Development Plan to strengthen annual revenue.
2. Pursuing initial steps (case statement development, feasibility study) toward a possible Capital Campaign to position the CSJ ministries and the Ministries Foundation into the future.
3. Engaging with the Province Communication Office to implement a comprehensive communications plan that will tell the inclusive CSJ story.
4. Repeat and build on the inclusive Carondelet Gala to create a signature event.
5. Engaging the new Planning, Partnership and Relationship Committee in a strategic planning process.

Goal 1: Raise \$1,705,000 through the Ministries Foundation for the ministries of the Sisters of St. Joseph, including the Ministries Foundation. Our direction will continue to come from an updated Integrated Fund Development Plan, which will be updated for FY 2020. It will focus on strengthening our relationships with existing donors as well as prospecting and soliciting new donors, including major donors and wills and bequest donors. This work will include meeting with current and prospective donors, making our case for funds, and asking donors and prospects for financial support.

We will increase our fund development by effectively implementing the following five main 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 corporate and family foundations that are focused on the CSJ Ministries missions.
- Use Board of Directors to help identify potential institutional donors and help gain access.
- Identify and document roadblocks and seek solutions, work-around strategies, or other funding sources.

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 Society by ensuring that all size donors and others are aware of our planned giving program.

5. Fundraising Strategy - Capitalizing on Key Memorial Gifts

- Maintain a relationship with the family that asked gifts be given to the Ministries Foundation on behalf of one of their loved ones.

Goal 2: Evaluate the 2019 Gala. Build on its momentum and strengths to plan for 2020. Learn from mistakes.

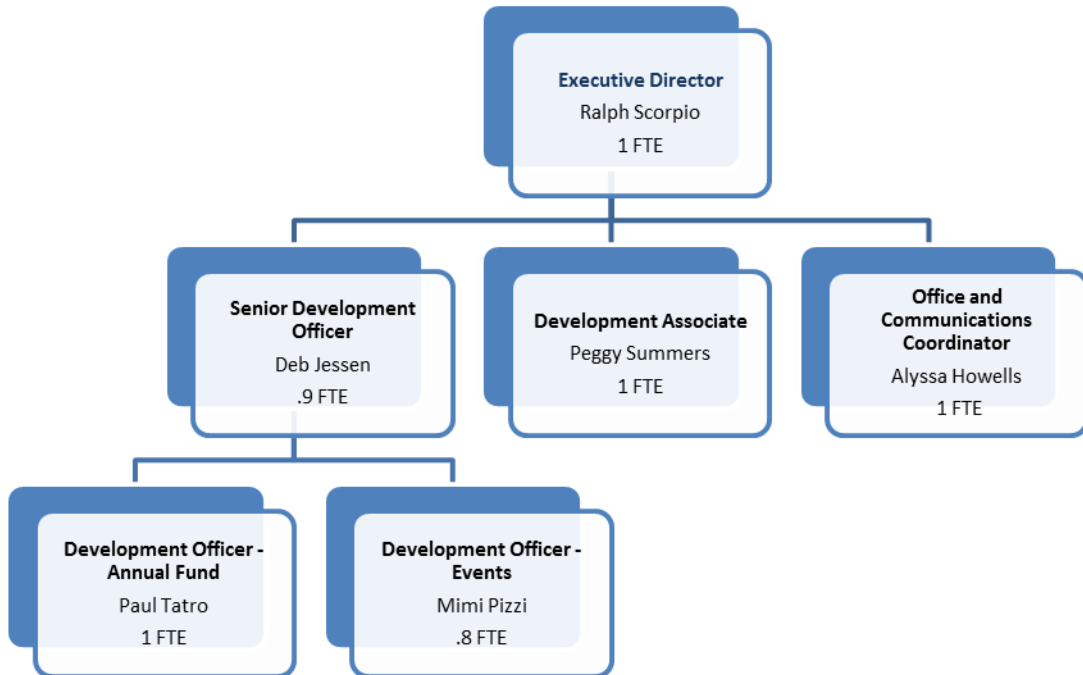
Goal 3: Position the Ministries Foundation and the CSJ ministries for the next decade.

- Develop a case for support for the ministries of the Sisters of St. Joseph into the future. Engage in a feasibility study. Decide future direction.
- Set the stage for a comprehensive capital campaign by collaborating with the Province to better tell the story of the CSJ ministries. Engage in a Feasibility Study in Fall of 2019. The study will help define future direction.
- Develop a strategic plan for the Ministries Foundation that works alongside the case for support for a possible campaign. Such a plan needs to address questions such as: What is the future of the CSJ ministries? What is the future of the Ministries Foundation? How do these intersect? This needs Province participation/inclusion, as well as the data/recommendations from the Province's Ministry Commission.

STAFF

Position	FY 2019-20	FY 2018-19
Executive Director	1.0	1.0
Development Officer – AF	1.0	1.0
Senior Development Officer	.9	.9
Development Associate	1.0	1.0
Events Coordinator	.8	.8
Office and Communications Coordinator	1.0	1.0
Total FTEs	5.7	5.7

Ministries Foundation Organizational Chart



OPERATING PLAN'S IMPACT ON FY 2019-20 DEVELOPMENT GOALS

Income:

At this time, the proposed total development goal is budgeted at **\$1,705,000**, which includes **\$600,000*** of annual giving (unrestricted); **\$375,000** in special events; **\$115,000*** for contract for service fees; plus **\$315,000** of funds held for others and **\$300,000** of grant revenue (which are not included in the operating budget).

*Revenues marked with an asterisk are unrestricted/operating revenues.

We anticipate at least \$300,000 in grants from government, corporation and foundation funders.

The \$315,000 in funds held for others includes:

\$40,000	Msgr. Doherty funds
\$200,000	Major Gifts – Donor Designated for LIS, Sarah's, SJW
\$75,000	Major Gifts – Donor Designated for SMHC

Expense:

We will continue to limit increases in administrative related expenses such as personnel, rent, postage and benefits as well as increases in overhead. The cost for health benefits increased this year. We will also continue to hold the line or decrease spending in certain areas, such as food, copier, annual report, and miscellaneous. We will offer a cost of living salary increase of 2.5% to staff, in line with the Province.

ACTIVITY PLAN

Annual Fund Drive (Unrestricted)

Goal: \$600,000

The Annual Fund Drive is the implementation of our Integrated Fund Development Plan and the Donor Networking process. The Annual Fund Drive will continue to focus on increasing numbers of new donors, inviting current donors to give at higher levels and moving top prospects to the donor list. The financial goal for this effort is **\$490,000**.

We are also budgeting **\$100,000** in unrestricted revenue from wills and bequests that have not been assigned to the endowment. These estate gifts would be from donors who have not enrolled in our St. Joseph Society.

Unrestricted grants/events (for operations) total **\$10,000**. This will include events to raise funds for the Ministries Foundation itself, including, but not limited to, Septemberfest.

Special Events**Goal: \$375,000**

Our main fundraising event is the annual Carondelet Gala. The financial goal (gross) for this event is \$375,000.

Corporate and Foundation Program**Goal: \$300,000**

The Senior Development Officer is expected to meet a financial goal of \$300,000 in grants by corporations and foundations to fund ministries. This is similar to last year's goal. A goal is set for \$250,000 in grants for St. Mary's Health Clinics. The Senior Development Officer will continue to work with the other ministries on proposals for new initiatives and collaborations that will be attractive to funding organizations and integral to the long-term health of the ministries. We have set modest goals, totaling \$50,000, for these other ministries due to their structure within the Province.

Donor Designated/Pass Through**Goal: \$315,000**

The Ministries Foundation will continue to work to raise both unrestricted and donor-designated major gifts. The Ministries Foundation has been asked to raise \$200,000 for Learning In Style, Sarah's...an Oasis for Women, and the St. Joseph Worker Program again this year. Working with the SMHC Executive Director, we will work to raise \$75,000 for St. Mary's Health Clinics. In addition, other Donor Designated/Pass Through funds to the ministries will total \$40,000 (Msgr. Doherty funds).

Contract for Service Fees**Goal: minimum of \$115,000**

In 2019- 20 the fee paid by the Province for receipting, acknowledging, and tracking Province gifts will continue at \$500/month, or \$6,000/year.

In addition, Ministries Foundation staff will bill for its hours spent on grant writing, special events, and major gifts solicitation. Our average staff hourly rate is \$36.80. To recover the expense of benefits and other overhead, we will bill at 125% of this rate, or \$46/hour. We have billed for approximately 2,500 hours each of the past few years, and this should be similar in 2019-20. This will total \$115,000.