

Sisters of St. Joseph of Carondelet, St. Paul Province
Ministries Foundation: 2020-2021 Development Committee Action Plan

I. Strategic Initiative: Acquisition

Goal: Increase number of new donors

Action	Responsible Party	Timeframe	Success Criteria	Status
Discuss ways to identify potential new donors to the Ministries through community partnerships	Annie & Committee work collaboratively with Marketing Committee and Ministries. Committee members assigned one ministry.	Ongoing	Documented numbers of donors related to current volunteer participation	Cmte needs to identify potential partnerships. Marketing Committee did begin exploration but process became contentious. Invite Sue Gehlsen to future Dev Comm mtg to discuss their partnerships.
Build a program around smaller donor introduction events such as house party; introduction of client stories at an event, either in person or virtual events	Annie, Mimi, Ralph. Pilot program with Committee members first	January-June 2021	A minimum of three smaller events during fiscal year. Goal of \$2,000 per event.	Should revisit in light of COVID and crowd size limitations.
Reach out to other Catholic and private institutions to explore similar relationship w/Blake	Committee, Annie and Ministries Directors work to develop plan and action steps with focus on SMHC and Sarah's	Spring 2021	At least one other partnership developed with students and their parents working on an initiative that benefits a ministry or the Ministries Foundation	Hold on any school partnership strategy until schools return to in person sessions.
Look at organizations with mutual alignment- similar mission, faith-founded, community partners and alignment with CSJs – and evaluate how best to reach out to their members and donors.	Committee	Ongoing	Implement plans to solicit within these groups; Increase donor participation from these groups	Continued conversations with Ann Cullen Miller at CCF regarding donors in common. Exploring SeptFest

Sisters of St. Joseph of Carondelet, St. Paul Province
Ministries Foundation: 2020-2021 Development Committee Action Plan

<p>Consociates, SJWs, former board members, former CSJ are potential sources</p>				<p>format for alumnuns. Need to determine format and strategy.</p> <p>Consociate solicitation in December using fall appeal pieces but their solicitation letter.</p> <p>Need to identify other connection strategies beyond mail.</p>
<p>Pursue acquisition strategies such as list purchases, crowdfunding and social media fundraising campaigns that would reach new donors through electronic or digital avenues- eg. Streamworks, iWave, GoFundMe, Kickstarter</p>	<p>Annie lead, Committee to explore</p>	<p>September-December 2020</p>	<p>Pilot an acquisition campaign in a specific target market (such as Catholic high school alumni) that results in new donors identified and giving</p>	<p>Explore funding available in FY21 budget to purchase acquisition lists.</p> <p>Explore iWave prospect generator</p> <p>Exploring pricing for list acquisition through MSP Magazine, Ideal Printers, other sources</p>
<p>Conduct competitive intelligence by reviewing annual reports of similarly aligned organizations to identify new potential donors. Determine plan to solicit within these groups.</p>	<p>Committee and BOD can identify comp organizations and assist with the competitive intelligence process</p> <p>Catholic Charities Cath Comm Fdn FQC's</p>	<p>November-December for scan work, January-June for interactions</p>	<p>Identify 30 new prospects and connect with during the fiscal year with a goal of 25% making a gift by end of fiscal year</p> <p>Goal of identifying 3 similarly aligned orgs per ministry for a total of 18 to review annuals.</p>	<p>Cmte needs to identify comp organizations; then staff can obtain annual reports; review data to develop solicitation lists; determine implementation plan.</p>

Sisters of St. Joseph of Carondelet, St. Paul Province
Ministries Foundation: 2020-2021 Development Committee Action Plan

	<p>Fraternal/religious leadership training progs Other ESL/GED neighborhood-based progs Women’s shelters focused on immigrants Residents of Carondelet Village</p>			<p>Annie has connected with CVT and received resource information. Need 6-8 additional comp organizations to connect.</p>
<p>Work with BOD to identify at least 2 new prospects each</p>	<p>Committee and Ralph</p>	<p>October – March 2021</p>	<p>Face – face meetings with 20 new prospects by staff and BOD members. 100% of new prospects identified will be visited during the fiscal year</p>	<p>First step is to have each BOD member call 10 donors listed in the most recent annual report. In process.</p>
<p>Solicit these donors to make a first gift by fiscal year end</p>	<p>Committee and Ralph</p>	<p>October – March 2021</p>	<p>75% response rate</p>	
<p>Pilot Gen Z and Millennial engagement campaign</p>	<p>Alyssa lead with recruited task force</p>	<p>February 2021</p>	<p>Launch efforts to attract younger donors through volunteer service and giving</p>	<p>Ministries Foundation applied for GVC through Carlson School of Management, interviewing in early November. IF funded, would work with a research team for 8-10 weeks in early 2021.</p>

Sisters of St. Joseph of Carondelet, St. Paul Province
Ministries Foundation: 2020-2021 Development Committee Action Plan

II. Strategic Initiative: Retention

Goal: Increase giving from current donors

Action	Responsible Party	Timeframe	Success Criteria	Status
Regularly review managed lists to keep A level prospects in line of sight and rebalance pools accordingly.	Committee reviews Ralph & Annie report on metrics	Bi-monthly review of portfolios	More donors giving more annually. Better list segmentation in a tiered pool.	iWave ProScore 4's included in fall appeal
Document cultivations and donor actions in RE when contacting current donors	Ralph & Annie	Monthly check in	Documented increased contacts	Staff are inputting email exchanges, phone calls, and personal notes.
Invite 50% of current managed donors to visit ministries, with goal of 10% attending on site or virtual tours	Ralph & Annie report to Committee with additional opportunity for Committee to get involved	Ongoing	Documented numbers of donors making visits of ministries. Determine baseline. Measure engagement of donors based on # of and size of gifts and/or increased attendance at events	In person not an option at this time. What are the alternatives? If virtual tours, what defines them and who creates them? Could we create a donor briefing where there is a video from Ralph that is emailed out to our managed lists? Or set up Zoom conferences with one rep from the org. Ralph could send invitation to everyone on his managed list to sign up for one of two times.
Have BOD and/or Dev Comm committee members make bi-monthly new donor thank you calls	Committee with staff support	October/December/February/April/June	Determine if this action increases first time donor renewals	On hold due to conflict with governance policy on file. When resolved, intended.

Sisters of St. Joseph of Carondelet, St. Paul Province
Ministries Foundation: 2020-2021 Development Committee Action Plan

<p>Conduct BOD Thankathon twice annually</p>	<p>BOD and Dev Comm with staff support</p>	<p>September/January</p>	<p>Deepen BOD engagement in donor stewardship work</p>	<p>On hold due to conflict with governance policy on file.</p> <p>Jane should advance conversation with Anita. Ralph will have draft of new policy by December board meeting. Waiver form needs to be drafted and signed by board members.</p> <p>If we can proceed, then we should schedule a thank a thon.</p>
<p>Implement annual fund using a variety of pieces and messages, including different mailings for specific market segments (eg, self-mailer versus brochure with letter enclosed, customized pieces for major donors, etc.) Integrate with Marketing Committee to produce a high quality piece</p>	<p>Annie lead</p>	<p>September/November/ March/ May</p>	<p>Determine if changing the message and the pieces positively impacts response rates</p>	<p>Underway. Contracted with new designer to create year long campaign around Essential Justice. Fall appeal is audience segmented with different pieces going to different audiences. Advent mailing is built around theme of Essential Hope, will arrive in homes the week after Thanksgiving</p>

Sisters of St. Joseph of Carondelet, St. Paul Province
Ministries Foundation: 2020-2021 Development Committee Action Plan

<p>Conduct wealth enhancement or overlays to better target high capacity high affinity donors. Consider conducting NCOA on a broader list of super lapsed or non donors in RE to identify potential prospects to screen. Goal is to every year, screen half of the list.</p>	<p>Annie lead and report to the Committee</p>	<p>August 2020</p>	<p>Rebalance managed portfolios, accordingly, increase direct solicitation of donors who meet priority criteria</p>	<p>iWave prospect screening completed July 2020 on 5,000 constituents.</p> <p>Data used to segment fall appeal mailing and identify new strategies.</p> <p>Staff still need to determine which data will be imported into Raiser's Edge. Recommend doing before the end of the year.</p>
<p>Research new cultivation and solicitation platforms to better increase communication and touchpoints with current donors to reverse the trend of declining giving-e.g Gravyty, other similar enhancements</p>	<p>Annie lead and report summary to the Committee</p>	<p>December 2020</p>	<p>Increase donor giving and penetration</p>	
<p>Conduct rate & review sessions for donors with high affinity and capacity based on wealth screening data currently not in a managed pool as a readiness step for potential campaign in FY22.</p>	<p>Annie lead</p>	<p>January-June 2021</p>	<p>Qualified list of prospects who may be approached during a campaign</p>	

Sisters of St. Joseph of Carondelet, St. Paul Province

Ministries Foundation: 2020-2021 Development Committee Action Plan

III. Strategic Initiative: Endowment

Goal: Increase number of new donors to Endowment Fund

Action	Responsible Party	Timeframe	Success Criteria	Status
Triage current donors who could become endowment donors. Explore doing a planned giving campaign in FY21 for a targeted segment (e.g. former CSJ's, Consociates)	Committee, Ralph	January- June 2021		
Work with a minimum of 4 board members to make visits to current donors who are likely endowment donors (current 140 St. Joseph Society members)	Committee, Jane, Ralph	January-June 2021	A minimum of 6 Face-to-face meetings with these donors with a minimum of 3 new gifts to endowment	