

Ministries Foundation Comparison Statement of Fund Raising Activities -- FY 2020/2021

As of March 31, 2021

	Year to Date	Budgeted Year to Date	2020/2021 Budget	2019/2020 Year to Date	2019/2020 Total
Operating Revenues:					
(Unrestricted)					
Annual Fund	\$511,660	\$425,000	\$550,000	\$582,894	\$699,144.81*
Contract Income	\$29,819	\$40,000	\$100,000	\$22,888	\$53,482
Operating Grants	\$0	\$0		\$0	\$0
Septemberfest	\$8,040	\$5,000	\$5,000	\$3,609	\$3,609
sub total:	\$549,519	\$470,000	\$655,000	\$609,391	\$57,091
Ministry Revenues:					
(Designated)					
Grants	\$432,510	\$200,000	\$300,000		\$532,836
Donations	\$143,707	\$220,000	\$315,000	\$163,848	\$208,122
Gala	\$101,195	\$100,000	\$400,000	\$70,083	\$165,672
Other Events	\$0		\$0	\$0	\$0
Wills & Bequests to Ministries	\$515,816	\$30,000	\$50,000	\$98,602	\$25,033
Wills & Bequests to Endowment	\$0	\$30,000	\$50,000	\$0	\$177,930
sub total:	\$1,193,228	\$580,000	\$1,115,000	\$332,532	\$1,109,593
TOTAL:	\$1,742,748	\$1,050,000	\$1,770,000	\$941,923	\$1,166,684

of Donors 1634

of New Donors 317

* Stang donation = \$200,824.29 - Annual Fund

**ANNUAL GIVING
SUCCESS MEASUREMENTS**

Month: March 31, 2021

Ministries Foundation Scorecard

<i>Gifts from all donors including individuals and organizations, excluding bequests and grants</i>	2018-19 Actual	2019-20 Actual	2020-2021 Goal	2020-2021 YTD
Financial Goal (AF, events, and designations only)	\$955,029	\$1,075,806	\$1,270,000	\$782,053
Overall Donor Count	2,007	1,862	2,000	1634
Acquisition/First Time Donor				
<i>First time gift</i>				
<ul style="list-style-type: none"> Number of new donors 	463	366	300	317
<ul style="list-style-type: none"> Dollars raised from new Donors 	\$99,106	\$108,874	\$65,000	\$165,750
Recaptured Donors				
<i>Donors who gave anytime in the past but not the previous fiscal year</i>				
<ul style="list-style-type: none"> Number of recaptured donors 	491	456	200	388
<ul style="list-style-type: none"> Dollars raised from recaptured donors 	\$109,873	\$165,003	\$50,000	\$107,435
First Time Donor Renewals				
<i>NEW donors from last year who gave again this year</i>				
<ul style="list-style-type: none"> Number of new donor renewals 	93	87	70	65
<ul style="list-style-type: none"> Dollars Raised from First Time Donor Renewals 	\$37,494	\$69,646		\$23,090
Repeat Donors				
<i>Donors from last year who gave again this year (inc. new donors)</i>				
<ul style="list-style-type: none"> Number of Repeat Donors (starting FY21, goal is 80% of FY19-20 actual overall donor count) 	1,045	1,016	1375	918
<ul style="list-style-type: none"> Percent of Goal 				67%
<ul style="list-style-type: none"> Dollars raised from Repeat Donors 	\$799,315	\$910,696		\$501,818
ADDITION CROSS SECTION OF DATA				
Memorial Donors				
<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"> Number of memorial donors 	207	168		149
<ul style="list-style-type: none"> Dollars raised from memorial donors 	\$14,090	\$16,726		\$17,753
Donor Advised Funds				
<i>DAF are third party entities who administer funds on behalf of the donor. The named fund is credited with the gift, with soft credit being given to the donor.</i>				
<ul style="list-style-type: none"> Number of donors giving through DAF 	70	81		56
<ul style="list-style-type: none"> Dollars raised from DAF 	\$87,790	\$120,509		\$49,513
Change in Donor Giving				
<i>Snapshot of all giving categories at fiscal year end</i>				
Number of donors upgrading gifts	357	335		
Number of donors whose gifts equal previous gifts	299	307		
Number of donors decreasing gifts	291	298		

Institutional Giving Dashboard FY 2020-2021
Through March 31, 2021

Goal FY2021: \$300,000

RECEIVED / COMMITTED	Purpose	Received	Submitted	Grant Size	Status	Notes
National Association of Free & Charitable Clinics (NAFC)	SMHC-SEAF	7/22/2020	4/17/2020	\$ 5,000.00	new	Requested \$10K, received \$5K.
Ramsey County	SMHC-SEAF	10/1/2020	9/5/2020	\$ 5,000.00	new	longshot - only \$40,000 total in pool
Mexican Consulate	SMHC-Outreach Model	10/7/2020	9/18/2020	\$ 10,000.00	renew	Que buenol The Mexican Government is saying it SMHC's style of public health and outreach programming at the Consulate is among the best it has seen and wants to use it elsewhere in the US...
Minnesota Department of Human Services	SMHC-COVID	10/15/2020	9/14/2020	\$ 47,700.00	new	Foward paperword to finance and SMHC for submission
St. Croix Valley Foundation	SMHC-COVID	10/20/2020	9/16/2020	\$ 11,200.00	new	For 32 families of SMHC in the St. Croix Valley; thank Jane for asst.
COF (Commissioned Officers Foundation) Barclay-Giel Seed Grants	SMHC-GO	10/30/2020	2/15/2020	\$ 7,500.00	new	Funding level tbd, see email of 10/30/20 from Erica for marketing in final report
City of Minneapolis / COVID Food Emergency	SMHC-SEAF	11/6/2020	10/28/2020	\$ 11,250.00	new	funded for sanitary supplies
Hennepin County department of health	SMHC-COVID	11/5/2020	10/29/2020	\$ 23,860.00	new	this one was resubmitted without SEAF costs and approved
Dakota County	SMHC-COVID	11/15/2020	11/4/2020	\$ 15,000.00	new	This one did include funding for overhead
Sisters of St. Joseph of Orange	SMCH-REACH+ (Mental Health Program)	11/6/2020	8/7/2020	\$ 10,000.00	renew	Mental Health Programming / asked for \$12K
DeltaDental Foundation	SMHC- Oral Health Program	12/31/2020	5/26/2020	\$ 25,000.00	renew	Execute program / take pictures / apply for more funding elsewhere
Allina / St. Francis Regional Hospital - Saints Foundation	SMHC- Shakopee / GO	11/18/2020	10/20/2020	\$ 25,000.00	renew	Thank Cindy Vincent for her help over the years, schedule report
HACER	SMHC-COVID	11/20/2020	11/5/2020	\$ 36,000.00	new	CARES Act Ramsey Co funding for CHWs; see email from HACER 11/20
Kopp Foundation	SJW	1/10/2021	6/12/2020	\$ 5,000.00	renew	unable to get a response from PO; and the family head died during this round of funding / timed out
Saint Paul Foundation	SMHC GO	12/11/2020	8/4/2020	\$ 35,000.00	new	schedule report, track
F.R. Bigelow Foundation	SMHC-GO	12/11/2020	8/4/2020	\$ 20,000.00	new	schedule report, track
UCare	SMHC- CHWs	12/15/2020	10/31/2020	\$ 5,000.00	new	Though Pang, a contact Cristina Flood made through events
Elizabeth C. Quinlan Foundation	SMHC- GO	12/15/2020	8/14/2020	\$ 5,000.00	renew	Recaptured funder, last grant 2018
City of Minneapolis / 5-Year Master Contract Eligible Provider List	SMHC- Speed funding / raise caps on \$\$\$	12/1/2020	10/16/2020	\$ -	new	in theory, this will open up new funding and higher levels from MPLS
Otto Bremer Trust	General operations	3/1/2017	9/19/2016	\$ 80,000.00	renew	Track for reporting
Ramsey County / Resilience Fund	CARES Act / COVID	1/15/2021	12/7/2020	\$ 50,000.00		wait for response (covers costs eligible from April to Sept 2020)
TOTAL RECEIVED AND COMMITTED				\$ 432,510.00		

PENDING	Purpose	Decision	Submitted	Grant Size		Notes
Minnesota Dental Foundation	SMHC-Oral Health Program	5/1/2021	11/30/2020	\$ 7,000.00	new	wait for response
Richard M. Schulze Family Foundation	SMHC-GO	12/16/2020	11/18/2020	\$ 45,000.00	renew	full proposal, site visit January 2021
Thomas S. Kemp Foundation	SMHC- GO	12/31/2021	12/21/2020	\$ 5,000.00	new	included summary report on past 2 years of programs; wait
American Heart Association	SMHC- Food & Housing support	3/30/2021	1/14/2021	-	new, previous declined	request is for two years; LOL/ abstract only, no dollar amount request at this time.
Minnesota State Bar Association Foundation	SMHC-Ventanilla de Salud	4/1/2021	1/15/2021	\$ 2,500.00	new	wait for decision
Securian Financial Foundation	SMHC-Financial Stability / Basic Needs (Food, Rent)	6/1/2021	1/22/2021	\$ 25,000.00	new, previous declined	Rejected in 2020, but Securian has added more access to Basic Needs in their RFP this year
National Association of Free & Charitable Clinics (NAFC) / Direct Relief	SHMC- DEEP & Cuidate	4/14/2017	3/14/2017	\$ 25,000.00	renew	requires specific cohort tracking for reporting / please email our Director of Strategic Initiatives, Ariana Gordillo at ariana@nafcclinics.org
Minnesota Department of Health	SHMC-Community Clinics RFP / 26 & under YY	4/29/2017	3/4/2017	\$ 45,000.00	new	probably a long shot since SMHC only serves a handful directly w primary care
Rita and Alex Hillman Foundation	SMHC-Hillman Innovations in Care (HIC) Program / CHWs	4/29/2017	3/29/2017	\$ -	new	LOI only / national level
James M. Cox Foundation	SMHC- One-Stop Womens Clinic / Shakopee	6/30/2017	2/14/2017	\$ 15,000.00	new	can reapply in June or October if not funded
TEGNA Foundation	SMHC- COVID Cares Ace / SEAF & CHWs	8/21/2017	2/21/2017	\$ 7,500.00	new	await decision
Fred C. and Katherine B. Andersen Foundation	SMHC-GO	8/31/2017	2/28/2017	\$ 15,000.00	new	await decision
Slaggie Family Foundation	SMHC-GO	8/31/2017	2/28/2017	\$ 5,000.00	renew	await decision

TOTAL PENDING

\$ 197,000.00

DECLINED	Purpose	Rej Date	Submitted	Grant Size		Notes
Constellation Fund	SMHC-GO	11/24/2020	10/30/2020	\$ 65,000.00	new, prev decline	Meet with Program officer in late summer or early fall to determine if want to try again
Robert Wood Johnson Foundation	SMHC-Community Solutions to Health Equity	11/23/2020	10/7/2020	\$ 100,000.00	new	No contact for follow up permitted for this funder; \$300,000 / 3 years)
Big Lots!	SMHC-GO	11/20/2020	5/26/2020	\$ 5,000.00	new	No particular reason given
The John Mondati Foundation	SMHC-GO	11/5/2020	9/1/2020	\$ 5,000.00	new	No particular reason given
OSilas Foundation	SMHC-GO	n/a	4/7/2020	\$ 10,000.00	new	multiple attempts to contact David Ford and Silas Ford have been unsuccessful / try to connect somehow
SC Johnson	SMHC-GO	11/24/2020	8/24/2020	\$ 10,000.00	new	Await decision
National Association of Free & Charitable Clinics (NAFC) / GoodRx	SMHC- In-Kind donation or subsidy for meds	11/3/2020	10/7/2020	\$ 24,000.00	new	check again next year, were encouraged to reapply if the program renews
Propel Nonprofits	SMHC-COVID	10/31/2020	9/25/2020	\$ 13,000.00	new	SMHC qualifies...\$from MN Disaster Recovery Fund
Shakopee Mdewakanton Sioux Community	SMHC- St. Francis Clinic and/or One-Stop Womens Clinic	12/31/2020	3/24/2020	\$ 40,000.00	renew	emailed CHad Portia 7/28/20 for official status update.
UnionPacific	SMHC-COVID / SEAF	7/29/2020	5/28/2020	\$ 10,000.00	new	Find a person inside / reconsider new application if possible

Minnesota Disaster Recovery Fund (MN Council of Foundations)	SMHC- COVID redistribution	8/26/2020	8/12/2020	\$ 200,000.00	new	Paul contacted PO to solicit feedback but nothing specific to point to
Wal-Mart local giving (7 locations)	SMHC-COVID / SEAF	8/23/2020	6/22/2020	\$ 35,000.00	new	must have it submitted by manager directly
Ramsey County	Sarah's	10/1/2020	9/5/2020	\$ 5,000.00	new	Sarah's not selected for funding but made some important connections
The Riverway Foundation	SMHC-GO	8/31/2020	4/21/2020	\$ 7,500.00	new, prev lapsed	Called 6/29, LM for Shirley - who will let us know by Sept
Hugh J. Andersen	SMHC-GO	9/22/2020	8/15/2020	\$ 10,000.00	new	SMHC is not a funding fit and was not invited to move forward
DonorView Corporation	SMHC-Mental health program	1/31/2021	11/11/2020	\$ 10,000.00	new	Don't call - they will notify by end of Jan. if selected.
AmFund (Golden Pear Award)	SMHC-Systems/tech	1/31/2021	11/13/2020	\$ 10,000.00	new	Longshot but they offered funding for operations hit hard by COVID / Speak with PO on 12/5
Hearst Foundation	SMHC-General / Latinx health outcomes	4/30/2021	12/28/2020	\$ 50,000.00	new	must wait one year to re-apply / aspirational
Ray Edwards Memorial Trust	SMHC-GO	12/31/2020	5/1/2020	\$ 10,000.00	renew, prev lapse	Decision not anticipated until later in the year
The Hardenbergh Foundation	SMHC-GO		10/15/2020	\$ 15,000.00	new	(PT received invite to send full proposal on 9/30 from Tammy Davis Cowley
Cruise Industry Charitable Foundation (CICF)	SMHC-10- GO 5 SEAF	9/1/2020	6/26/2020	\$ 15,000.00	new	Review quarterly. Inquired by fall if not response.
Hennepin County DOH	SMHC-COVID Cares Ace / SEAF & CHWs	11/4/2020	10/29/2020	\$ 25,000.00	new	This amount represents proposed funding for SEAF that was subsequently eliminated upon second round consideration
Costco Wholesale	SMHC-DEEP	1/1/2021		\$ 10,000.00	new	wait for decision
The Minneapolis Foundation	SMHC- Racial & Economic Justice	Full Proposal / Online	2/22/2021	\$ 50,000.00	new	rejected without review

TOTAL DECLINED \$ 734,500.00

IN PROCESS						
	Purpose	Document	Deadline	Grant Size		Notes
Medica Foundation	Mental & Social health and wellness services	LOI only	July if invited	\$ 50,000.00	renew	LOI sent in 4/2
Cigna Foundation	Health & Wellbeing / di	LOI only	Aug. if invite	\$ 100,000.00	new	LOI due 4/23
Burns Family Foundation	Renewal report & request	5-page document	4/29/2017	\$ 5,000.00	renew	

TOTAL IN PROCESS \$ 155,000.00

New since previous report

TOTAL FUNDING IN PLAY \$ 1,519,010.00

Development Committee Charter

Purpose

To direct, oversee, and assist as necessary in the establishment and implementation of fundraising programs capable of supporting the activities and goals of the Ministries Foundation and CSJ ministries.

Membership

The Ministries Foundation Board Chair will appoint a Committee Chair and members from the Board. Additional committee members who are not on the Board may be appointed as deemed appropriate by the Foundation Board Chair and Committee Chair.

Meetings

Meetings will be scheduled at least four times per year and as often as needed.

Responsibilities

1. Secure the financial resources necessary to meet the needs of the Foundation and the ministries.
2. Ensure the successful solicitation of major gifts by building the necessary capabilities and relationships with donors.
3. Ensure that all Foundation fund raising programs are carried out in a professional manner consistent with the highest values and mission of the CSJs, the Ministries Foundation, and professional philanthropic and development practices.
4. Set the direction of a detailed annual development plan that will include all activities, timetables and goals as well as the organization and budget required for implementation.
5. Monitor the effectiveness of all aspects of the detailed plan on an ongoing basis and make appropriate and necessary adjustments.
6. Provide quarterly reports to the Foundation Board on progress and effectiveness of the annual plans and on any adjustments that have been deemed necessary and appropriate.
7. Participate in development activities as appropriate to promote the work of the Foundation and increase its effectiveness, as well as to gain greater personal understanding.
8. Work in concert with other committees and individuals as appropriate and necessary to meet the needs and goals of the Foundation.
9. Advocate that the development staff has the resources necessary to carry out the development plans.
10. Provide advice and assistance to the development staff as is necessary to ensure that the development plans can be carried out and the goals met.

Appeal Performance

FY19-20

FY 20-21

Gift appeal	7/1/2019 to 6/30/2020			7/1/2020 to 6/30/2021		
	Number of Donors	Total given	Number of Gifts	Number of Donors	Total given	Number of Gifts
Bold Moves/Possumus	224	\$40,617.00	248	230	\$48,187.00	253
Christmas AF Solicitation Letter	133	\$25,105.00	133	175	\$30,769.00	177
Direct Solicitation	11	\$54,251.95	11	4	\$15,721.37	4
Min Foundation Website	109	\$29,347.00	214	151	\$39,430.00	251
October AF Solicitation - Targeted A	0	\$0.00	0	86	\$58,046.32	86
October AF Solicitation Letter	196	\$42,825.00	203	172	\$25,944.95	174
Septemberfest 2019	12	\$2,350.00	12	0	\$0.00	0
Septemberfest 2020	0	\$0.00	0	40	\$8,040.00	41
Spring AF Solicitation Letter	52	\$5,560.00	52	12	\$1,525.00	12
St. Jos Day LYBUNT	0	\$0.00	0	3	\$220.00	3
St. Joseph Day Appeal	181	\$26,970.00	183	107	\$21,455.00	107
	794	\$227,025.95	1,056	884	\$249,338.64	1,108

THANKATHON SUMMARY February 2021

The stats:

Connected with the donor	76	35%
Prayer Requests	11	
Requested follow up	10	
Unable to connect/unable to leave message	20	9%
Left Voice Message	88	40%
Wrong number/Disconnected	33	10%
Total:	217	
Total number of callers	9	

The comments from those called:

- really appreciated the call
- appreciated the opportunity to share a Sister connection
- appreciated call, not necessary
- will continue support in the future/hope to give more in the future
- want to know about volunteer opportunities
- keep up the good work
- please send information on the Gala
- hope to donate stimulus money to the Sisters
- used to work with the clinic/LIS/Sisters and have great respect for them

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 by providing volunteer or service opportunities through community partnerships, higher education, and private high schools.	Annie & Committee work	Ongoing	Documented numbers of donors related to current volunteer participation	Invite a ministry director or two to future Dev Comm mtg to discuss their partnerships.
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. Consociates, SJWs, former board members, former CSJ are potential sources	Ralph	Ongoing	Implement plans to solicit within these groups; Increase donor participation from these groups	<p>Consociate solicitation in December using fall appeal pieces but their solicitation letter. Completed in December.</p> <p>On hold- Explore SeptFest format for alumnuns (171) Create special invitation insert for the alumnuns for the GALA.</p> <p>Need to identify other connection strategies beyond mail.</p>
Pursue acquisition strategies such as list purchases, crowdfunding and social media fundraising campaigns that would reach new donors through electronic or digital	Annie lead, Committee to explore	September-December 2020	Pilot an acquisition campaign in a specific target market that results in new donors identified and giving	Acquired List rentals for Women Owned Businesses and Social Justice donors with 2 mailings in process.

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

Ministries Foundation: 2020-2021 Development Committee Action Plan

avenues- eg. Streamworks, iWave, GoFundMe, Kickstarter				
Conduct competitive intelligence by reviewing annual reports of similarly aligned organizations to identify new potential donors. Determine plan to solicit within these groups.	Committee and BOD can identify comp organizations and assist with the competitive intelligence process Catholic Charities Cath Comm Fdn FQC's Fraternal/religious leadership training progs Other ESL/GED neighborhood-based progs Women's shelters focused on immigrants Residents of Carondelet Village	November-December for scan work, January-June for interactions	Identify 30 new prospects and connect with during the fiscal year with a goal of 25% making a gift by end of fiscal year Goal of identifying 3 similarly aligned orgs per ministry for a total of 18 to review annuals.	Comp org list compiled and reviewed, each ministry had 6+ comps. Annual reports secured where available, and donor lists routed among board and committee members for introduction. Yielded 12 prospects, 9 or which we already donors to MF. Not a profitable use of time.
Work with BOD to identify at least 2 new prospects each	Committee and Ralph	October – March 2021	Face – face meetings with 20 new prospects by staff and BOD members. 100% of new prospects identified will be visited during the fiscal year	First step is to have each BOD member call 10 donors listed in the most recent annual report. Kris will do a push at February board meeting.
Solicit these donors to make a first gift by fiscal year end	Committee and Ralph	October – March 2021	75% response rate	Not started.
Pilot Gen Z and Millennial engagement campaign	Alyssa lead with recruited task force	February 2021	Launch efforts to attract younger donors by developing and delivering messages through platforms that resonate	Ministries Foundation applied for GVC through Carlson School of Management, interviewing in early

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

Ministries Foundation: 2020-2021 Development Committee Action Plan

			with their lifestyle. Identify volunteer opportunities that might interest them.	<p>November. If funded, would work with a research team for 8-10 weeks in early 2021.</p> <p>Declined by GVC 12/31/2020.</p> <p>This priority should be moved to the Marketing Committee Plan</p>
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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. Tracked through giving throughout the fiscal year.
Document cultivations and donor actions in RE when contacting current donors	Ralph & Annie	Monthly check in	Documented increased contacts	Staff are regularly inputting email exchanges, phone calls, and personal notes.
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	Included in Thankathon calls in February.
Conduct BOD Thankathon twice annually	BOD and Dev Comm with staff support	September/January	Deepen BOD engagement in donor stewardship work	Completed February-March 2021, 2 sessions. See summary report.

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Ministries Foundation: 2020-2021 Development Committee Action Plan

<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.</p> <p>Advent mailing built around theme of Essential Hope.</p> <p>Continued essential justice theme in St. Joseph Day mailing and both acquisitions.</p>
<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.</p> <p>Recommend doing</p>

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

Ministries Foundation: 2020-2021 Development Committee Action Plan

				before the end of the fiscal year.
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 (use of AI in increasing utility)	Annie lead and report summary to the Committee	December 2020	Increase donor giving and penetration	Viewed demo of product in March 2021 with Annie, Ralph and Kris. Would be very useful if campaign moves forward, would need to be included in campaign budget.
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.	Annie lead	January-June 2021	Qualified list of prospects who may be approached during a campaign	Schedule for May-June

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		Not started