



Battle Creek Area
Catholic Schools

FOUNDATION

Future Directions

Version 1.0

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Introduction

The Battle Creek Area Catholic Schools Foundation (BCACS Foundation) was established in 1983 to secure supplemental financial support for Catholic education in Battle Creek. As the fundraising arm of the Catholic school family, the Foundation is the cornerstone of our future and assures the highest quality education for our students. Throughout this 30 year history, the Foundation has raised over \$20 million in support of Catholic education.

In the summer of 2012, the Foundation Board of Directors determined that it was an appropriate time to develop a strategic direction for the organization. A strategic planning process was established and started in November 2012. This plan was developed by a strategic planning team, comprised of the BCACS Foundation Board, as a way to help our community understand who we are as an organization and where we want to take the organization into the future. There are many opportunities we can pursue and directions we can take—in fact, so many that it is easy to lose focus. This plan captures the current thinking regarding the future direction of the BCACS Foundation for the next five years.

Plan Structure

This plan is organized as follows:

Core Values. The basis for our plan rests in our core values. These core values represent who we are as a foundation (as a unique organization); they are our “identity.” Core values are deeply held; they are such that we would not consider making any important foundation decision without taking them into account.

Purpose. Building on the core values, we have a purpose. The purpose, often referred to as the mission statement of the organization, represents why we exist as an organization. The purpose is congruent with the core values and articulates our unique place, our mission in the world.

Vision. Our vision represents what kind of organization we want to create. It articulates what the leadership sees the organization becoming in the years to come. The vision is guided by, and consistent with, our purpose and core values.

Strategies. Our strategies represent how we intend to create the organization we see in our vision. These strategies were developed with careful analysis of how we believe our Foundation operates, the “system” we are working on, and the specific success factors we believe will help us achieve our vision. Ideas for specific actions we intend to pursue are also articulated here.

Supporting materials. In the appendix, we include supporting models that were used to generate this plan.

The elements in this plan build upon each other. Our purpose is true to our core values, our vision is supportive of our purpose, and our strategies are designed to achieve our vision. This planning structure was chosen to ensure that the choices we make are ones that tie our actions to our core values and purpose.

While these plan elements are written in words, they really are things we want to internalize as a foundation community. This plan document offers statements to guide our discussions, decisions, and actions in the future.

Core Values

The following core values were discerned as representing the core values for the BCACS Foundation as an organization.

- Faith-based** Our Catholic faith is key to our identity. We will rely on our faith to guide all of our decisions and actions, and will profess this faith through our work and prayer.
- Stewardship** We are blessed with generous support from our donor community. We must be responsible in our oversight and care of the resources and relationships with which we have been entrusted.
- Legacy** We are essential to the ongoing success of Catholic education in our community. The actions we take now must demonstrate an unwavering commitment to future generations.
- Accessibility** Catholic education is open to all who seek it in our community. We support efforts to provide access to Catholic education.

Purpose

Building on the core values, the following purpose was identified by the Strategic Planning Team, reflecting on the core values and building on the past purpose statement. This purpose represents why we exist as a foundation.

To help fund quality Catholic education for current and future generations in the Battle Creek community.

Vision

Our vision helps us “see” the future of the organization. It is what we wish to create via the strategies and actions in the next section. The vision for the BCACS Foundation is:

The Battle Creek Area Catholic Schools Foundation advocates for Catholic education in Battle Creek, primarily through support of the pre-K through grade 12 Catholic schools. We envision school-based Catholic education being available in perpetuity to all who seek it, through strong, broad-based financial and spiritual support. Our engaged Board, dedicated staff, and committed donor community are unwavering in their support of Catholic education.

Strategies

We have a compelling vision that defines what we want to create for the future and are confident that it is supportive of our core values and purpose. Now we turn to our specific strategies that will help us move toward this vision as a foundation.

To support movement toward our vision, we have identified a number of key success factors that we believe should receive our collective focus in the coming years. Key success factors are elements in our system that are most important to our successfully achieving our vision.

BCACS Foundation Revenue. As a fundraising organization, revenue is central to our ability to achieve our organizational goals.

Number of Donors. Our generous donor community is the cornerstone of our ability to generate revenue. The number of donors directly impacts our revenue and ability to be effective.

Quality of BCACS Foundation Staff Leadership. People ultimately make the difference in any organization. The quality of Foundation staff leadership is a critical driver of organizational efficiency and effectiveness.

Quality of Communications. Effectively communicating to our donor community and other stakeholders provides ongoing visibility to, and drives interest in, the Foundation as well as the BCACS schools. We must have high quality communications to achieve our vision.

These key success factors are only a part of our complex Foundation system. They relate to, influence, and are influenced by many other factors and realities within our organization. Based on an analysis of our Foundation and how we believe it works (see appendix), we have identified the following goals and actions that will receive our focus. As a foundation, we will be intentional as to how and when to implement these goals, relying on our key success loops to make informed decisions about who, what, when, where, how and why.

Year 1 Goals

The following goals have been selected as the focus for year 1:

Goal 1: Improve success of campaigns (BCACS Foundation Revenue strategy)

- A. **Evaluation.** Feedback is critical to ongoing growth of any organization. To ensure that we are learning and growing, we will evaluate each campaign regarding effectiveness, to determine what worked and what did not work, with the goal of improving the effectiveness of future campaigns. This will include formal evaluation of past campaigns along with surveys and focus groups of past donors.
- B. **Campaign trends.** Using the same approach year after year can get very comfortable and even work well. However, to innovate, we need to understand what is working with regard to campaigns generally. We will work with a marketing firm to evaluate trends in effective campaigns to determine what elements we might incorporate into our campaigns.

- C. **Feasibility studies.** It is prudent to understand the feasibility of the campaign before expending resources to launch and run the campaign. For larger campaigns, we will conduct feasibility studies to predict campaign success and provide direction.
- D. **Campaign template.** There are common characteristics of each successful campaign. To drive success in future campaigns, we will create a template of an effective past "campaign plan."
- E. **Individual "asks."** Blanket solicitation for funds can be successful in campaigns. However, relationships are key to really driving fundraising. We will increase the number of one-on-one "asks" in our campaigns. This will involve board members and other volunteers to steward these connections allowing us to develop relationships to the fullest extent possible.
- F. **Board education.** Board members are key drivers behind campaign success. To best position board members for this role, we will educate members on how to most effectively contribute to each campaign based on their specific skills and interest. Board members area of interest and skills will help determine their roles in the campaigns. We will partner with a local organization for formal board training and education.
- G. **Parish updates.** The parish councils are important partners in our funding of the schools. We will deliver a "state of the Foundation" update annually to all the parish councils.

Goal 2: Increase number of donors (BCACS Foundation Revenue strategy)

- A. **Appeals.** Providing multiple and varied opportunities to give, opens up more options to match potential donor interests. We will increase the number of focused/targeted appeals done throughout the year, while diversifying the target donors for each appeal.
- B. **Power in numbers.** Relationships are key to driving donations. We will increase the number of volunteers that actively participate in solicitation to more effectively steward the many relationships that exist in our BCACS community. An Annual Fund Drive Committee of at least 15 different constituencies including parishes, school staff, parents, alumni, etc. will lead the fund drive.
- C. **Donor diversity.** Expanding the donor base will result in more donors and varied donation levels. We will focus on different segments of donors such as alumni, parents, young families, staff, past donors, community, and parishes. We will also work to enhance how we identify and classify potential donors.
- D. **Donor stewardship.** Once a donor relationship is established, it is critical to properly maintain this relationship to ensure ongoing donations. We will enhance our outreach and stewardship of these relationships. This includes board members making thank you calls to donors.

Goal 3: Develop and implement a staff review process (Quality of BCACS Foundation Staff Leadership strategy)

- A. **Staff evaluation.** Continual improvement is only possible with regular and structured feedback. We will appoint a board committee to conduct at a minimum, an annual BCACS Foundation staff review. This will include formal review documentation.
- B. **Goal setting.** This strategic plan is designed to cover multiple years (3 – 5 years). Using a structured process, we will create SMART (specific, measurable, achievable, realistic, and timely) annual goals for staff aligned with this strategic plan to facilitate the staff evaluation process and make clear the annual priorities for the Foundation.
- C. **Staff recognition.** It is important that staff be properly recognized when achieving established goals other than fundraising. We will develop a plan for annual goal achievement for Foundation staff and adjust compensation appropriate to the attainment of these annual goals and market conditions.
- D. **Goal communication.** The annual goals need to be clearly understood and agreed upon by the Board and staff. They represent a mutual understanding of the targets being established. The Executive Committee of the board will agree upon annual goals and will clearly communicate these goals to the entire board and other stakeholders.
- E. **Staff responsibilities evaluation.** Annual goals and priorities will be very helpful to guide efforts of the Foundation staff. In addition to setting these formally, we will annually evaluate the effectiveness of specific staff responsibilities to ensure proper alignment of duties to staff roles.

Future Goals

BCACS Foundation Revenue

As a fundraising organization, revenue is central to our ability to achieve our organizational goals. The following goals and actions have been identified to support the BCACS Foundation Revenue key success factor.

Goal 1: Increase investment returns (in process)

- A. **Portfolio management.** We will actively work to evaluate our investment strategies as it relates to internal and external options for portfolio management.
- B. **Increase expectations.** Until such time as we determine our portfolio management directions, we will clarify our expectations with our current management firm regarding higher investment returns.
- C. **Fee structure.** We will work with any external management firm to decrease their fees, thereby increasing our overall returns.
- D. **Investment committee.** The investment committee will remain a standing board committee and actively oversee the investment portfolio.

Goal 2: Build endowment

- A. **Planned giving.** We will promote the importance of the planned giving program within the BCACS community as well as in the larger community. This will include enhancing marketing and increasing the number of planned giving seminars and programs. We plan to continue with a spring and fall planned giving seminar as was done in the past and add targeted seminars on specific topics or for different age ranges.
- B. **Endowment policy.** We will renew our endowment policy and adhere to this policy with our investment decisions. (in process)
- C. **Donor prospects.** We will actively identify suitable prospects to cultivate as BCACS donors to the endowment.
- D. **Dedicated staffing.** Managing a planned giving program is very time consuming. We will create and fill an administrative position to focus on the planned giving program.
- E. **Plan measurement.** We will more clearly define milestones of endowment goal progress and actively measure progress against these parameters and benchmarks. This will be reported out twice a year by the investment or endowment committees.

Goal 3: Develop and implement a grant writing initiative (internal and external)

- A. **Dedicated staffing.** Grant writing can generate significant revenue for specific programming. We will employ or utilize administrative staff to write grants. This will include identifying and qualifying foundations that will support our programs.
- B. **Needs driven.** To be effective, it is important for the grants to target the highest priority needs. We will engage school administration and board to ensure alignment of direction. We will also meet with school staff to identify and prioritize funding needs across the system. Requests will be submitted to a the Foundation via a grant request form. It will then be reviewed by the grant making committee. If the committee is in favor of the request, it will be presented to the full board for approval.
- C. **Capital campaign.** We have a successful track record with our capital campaign and many needed improvements and buildings have been delivered. However, needs remain. We will re-establish the capital campaign committee and seek grants specifically for capital improvements. The completion of the St. Philip campus is the priority for the next capital campaign.

Goal 4: Develop education program for current students and recent alumni to give back to BCACS Foundation

- A. **Alumni participation.** Our alumni appreciate the value of a BCACS education more than anyone. As such, they want to give back to the system that provided their past and current opportunities. We will target recent alumni through multiple communication methods, including social media and other appropriate channels.
- B. **Active alumni engagement.** We will enhance communications to alumni groups where we see "gaps" in giving. We will proactively educate alumni and current students about considering the BCACS Foundation as a "regular" donation.

- C. **Staff for program success.** We will retain an appropriate staff member to focus on our alumni outreach program.
- D. **Leadership outreach.** Class leaders during the high school years likely possess many ideas about how to advance our alumni fundraising efforts. We will reach out to former class presidents/leaders for ideas on improving our alumni outreach.
- E. **Newsletter.** Alumni need to feel continually connected to our schools over time. We will develop and distribute a semi-annual alumni newsletter focused on improving alumni connection and loyalty to BCACS.
- F. **Survey.** It is important to understand what alumni are thinking and feeling regarding our schools and our outreach efforts. We will execute an alumni survey to determine likes/dislikes of BCACS Foundation to better focus our fundraising efforts.
- G. **Advisory board.** As a key source of input, we will develop an advisory board of current students and recent alumni to keep engagement high and to guide our alumni outreach efforts.
- H. **High school connections.** High school students could benefit from better understanding the work of the BCACS Foundation. We will meet with each class to educate on the BCACS Foundation and the work we do to improve the schools.

Goal 5: Diversify Board involvement (in process)

- A. **Board membership.** There is strength in numbers, particularly in an organization like BCACS Foundation where relationships are key. We will expand board membership and/or non-board committee membership to increase the number of connections available for outreach and fundraising. Adding additional non board members to existing committees will also give strength to the Foundation and bring in people with new talents and skills to help with Foundation work.
- B. **Emeritus status.** We are blessed with a number of board members who have dedicated themselves to the BCACS Foundation for many years. We desire to keep these board members engaged at some level. We will develop an emeritus board member status (not attending all meetings) to assist with donor outreach and other important activities.
- C. **Board exposure.** Many staff and parents in our system as well as community members are unaware of what the BCACS Foundation does for our schools. We will invite at least one (1) visitor to each board meeting in order to increase visibility of our work (and to help with board member recruiting.) The board meeting schedule will be posted on the website. The Board Chair will write articles for the bulletins and school newsletters about the Foundation. School and Foundation articles will be submitted to the St. Philip and St. Joseph parish newsletters too.
- D. **Outside perspectives.** We know that BCACS Foundation exists in the wider community and can benefit from external input. We will recruit board members from outside the Foundation community.
- E. **Board training.** Effective board members have the skills to contribute to the Foundation. To enhance board member skills, we will offer training to board members, including topics such as fundraising, and public relations. We will partner with a local organization for formal training.

- F. **Board skillsets.** The board can benefit from specific skills that are present in our community. We will identify qualities sought in new members (e.g. finance, marketing, etc.) and recruit board members who have these skills.
- G. **Parental input.** Parents are key stakeholders in our BCACS community. We will gather input from parents regarding what BCACS Foundation should do to better support the schools and be a more effective organization.
- H. **School staff.** Like parents, school administrators and staff have a huge stake in the success of the foundation. We will actively engage school personnel in the work of the Foundation.

Goal 6: Enhance the quality of the BCACS Foundation image

- A. **Media relations.** Effectively getting the word out regarding the many benefits of a BCACS education can positively impact donations to the Foundation. We will add at least one board member with media relations experience.
- B. **Articles.** “Insiders” in the BCACS community often take for granted the many positive aspects of the BCACS system. We can benefit by recognizing, documenting, and disseminating these stories. We will work with the school board and the Enrollment Coordinator on "great things" articles for distribution to parishes and the broader community.
- C. **Local company connections.** Many local companies provide guidance to new employees relocating to the Battle Creek area. These incoming families are usually professionals looking for good schools for their children. To make it easier for human resource departments at local companies relocating employees to Battle Creek, we will support the schools in developing and distributing kits to explain the benefits of a BCACS education and experience.
- D. **Top donor connections.** Top donors clearly believe in what the BCACS system is trying to accomplish. We need to keep these top donors informed about what is happening in our schools to keep them connected and to help them spread the word to others. We will develop donor profiles for the lead donors and identify the optimal volunteer/trustee/staff to share progress of the schools annually with these donors.
- E. **Donor feedback.** Understanding what donors want and need from the Foundation to continue giving and to increase gifts is important to our fundraising efforts. We will develop a system for donors to provide feedback to the Foundation on an ongoing basis. Survey monkey, written surveys, and conversations with donors will be used to gather information to help with the success of our campaigns and image.
- F. **Broaden communications.** Typically, BCACS Foundation communications center on the annual campaign. We will develop and disseminate communications to various stakeholders around a range of topics in addition to the annual campaign.

Goal 7: Identify & prioritize needs for funding

- A. **Capital funding needs.** There are many capital items that need funding. We will identify capital and program needs within the school system, research costs associated with each, and develop a system whereby priority is assigned. This provides an effective fundraising tool to access when

working with donors who have an affinity to specific causes. We will match these funding needs and priorities with donor interests to better target fundraising.

- B. **Funding specificity.** The Foundation provides a large general subsidy to fund school operations. We will work with the schools to move toward more specific funding and less general subsidy over time, via mechanisms such as grants.

Goal 8: Showcase student success within our parishes and schools

- A. **Student involvement.** Students can be the best spokespeople for our schools. In coordination with the Pastors, we will offer students service hours for speaking at Mass, drafting articles for bulletins, the press, etc. to encourage involvement. Speaking at Masses for the kick-off of the Annual Fund Drive and during Guardian Angel and Catholic Schools week will be a priority.
- B. **Regular updates.** Our students are excelling in many ways. Continually communicating about the progress of the schools and students keeps current and potential donors connected to our schools. We will publish and disseminate quarterly reports on the schools' progress. We will showcase "star" students to provide donors with "the results" of their philanthropy. The quarterly parish newsletters will be one way to feature our students and the success of our schools.
- C. **Student/donor relationships.** Relationships are key to our fundraising success. We will assign students to top donors. These students will interact with top donors via thank you notes, hosting donors at events such as the Christmas program and writing updates to donors.
- D. **Student/alumni relationships.** Alumni are a key resource for increasing visibility to the Foundation. We will assign student panels to reach out to specific alumni (e.g. football/volleyball to former alumni athletes).

Goal 9: Improve quality & quantity of communication

- A. **Professional marketing.** Marketing is often an effective way to raise awareness and support for schools. We will hire a professional marketing firm to assist in the creation of a comprehensive marketing plan for the BCACS Foundation.
- B. **Calendar.** Knowing what fundraising activities and social events are happening throughout the year is important for effective fundraising coordination. We will develop a common schedule/calendar system wide to allow for event and fundraising coordination. The Director will meet annually with the principals and communicate through out the year to coordinate this calendar. Groups and clubs will discuss their fundraising ideas with the principals and the Foundation director to get official approval of fundraising activities and dates.
- C. **Communication evaluation.** Knowing what works and what doesn't is critical to ongoing improvement. We will assess the impact of foundation communication efforts by tracking the number of responses received. We will also analyze the impact of different communication methods and behavior trends based on things like communication timing.

- D. **Key events.** There are resource development opportunities that arise based on events in our community or things such as changes that impact charitable donations. We will analyze key events for fundraising potential.

Number of Donors

Our generous donor community is the cornerstone of our ability to generate revenue. The number of donors directly impacts our revenue and ability to be effective. The following goals and actions have been identified to support the Number of Donors key success factor.

Goal 1: Cultivate alumni constituency

- A. **Alumni communication.** Staying connected with alumni is an important way to earn their loyalty and thereby encourage their financial support for the BCACS Foundation. We will disseminate a semi-annual newsletter to the alumni to keep them connected and engaged.
- B. **Alumni program focus.** Working with alumni will require dedicated focus to drive success. We will retain an appropriate staff to focus on our alumni outreach program, in coordination with the schools. We will determine appropriate funding source(s) to support this function.
- C. **Alumni program design.** Current and past class leaders, presidents, and other influencers are an important resource for information and innovation for our alumni program. We will proactively reach out to them for their valuable input and ideas on how to create and implement an effective alumni program.
- D. **Alumni feedback.** We will gather broader feedback from alumni by conducting surveys to draw out what we are doing well and where we might improve.
- E. **Alumni database.** Our ability to effectively outreach to alumni will depend on accurate data, including those who graduate from St. Joseph and do not attend St. Philip High School. We will ensure that the alumni database is updated, maintained, and accurate.
- F. **Social media.** Alumni are increasingly spending their time using social media tools like Facebook and Twitter. As part of our larger marketing efforts, we will use social media tools to stay connected and engaged with alumni.

Goal 2: Increase “ownership” of schools

- A. **Schools as Church mission.** Our commitment to our parishioners’ children has never been stronger. It is critical that all parishioners see the schools as an important part of the mission of the Church. We will work with priests to promote school and foundation support from the pulpit.
- B. **System-wide focus.** We have worked hard to make the entire school system “one school.” We will re-invigorate and support the concept of preschool through grade 12 as a core principle.
- C. **Parental education.** In most families, the decision about where to send our children for education lies with the parents. Related, donations to help cover the full costs of education are also in the purview of the parents. We will educate parents about BCACS Foundation and its role

in funding Catholic education in Battle Creek. This includes the Development Director meeting with new families throughout the year and using education opportunities at school functions as appropriate such as the “State of the Schools” meeting.

- D. **Volunteer recognition.** While a big focus for the Foundation is fundraising, it is important that we recognize the gifts of time and talent that are happening across our system. We will find ways to recognize and celebrate the many volunteers in our system and/or support the school in their celebration of volunteers who give so much and contribute to our schools’ success.
- E. **Relationships.** People are connected to an organization through its people. This is where close relationships are built. We will build on the one-on-one relationships to further the goals of the Foundation while ensuring both breadth and depth of donor relationships.

Goal 3: Expand planned giving initiatives

- A. **Planned giving.** Planned giving is a very powerful long term funding source for the Foundation. It is important to work now to develop the opportunities for giving during a stakeholder’s lifetime, including charitable gift annuities. We will develop planned giving opportunities for a broad set of constituents, including memorial giving.
- B. **Endowment.** Our endowment is an important anchor for the Foundation to be able to continue to invest in the schools. We will develop communication about the current endowment and set a goal to increase this endowment to \$20,000,000.
- C. **Program diversity.** The ways that donors give often change throughout a lifetime. We will develop programs targeted to different age groups to better diversify our donor base and depth and breadth of donations.
- D. **Professional connections.** Local financial planners and attorneys often work with clients on estate planning and related matters. We will connect with these professionals to increase awareness of the Catholic schools, the BCACS Foundation and our giving focus, while maintaining membership and developing personal connections with members of these professional groups.
- E. **Testimonials.** People are often motivated to give when they can more clearly see how their donations are helping others, as well as, when they see that others just like them have given to a particular organization. We will develop a portfolio of testimonials of those helped by foundation donations, as well as, those who gave significant gifts and how fulfilling it was for the donor. This will include inviting donors to speak at functions regarding their giving and featuring donors on the website and in local media.

Quality of BCACS Foundation Staff Leadership

People ultimately make the difference in any organization. The quality of Foundation staff leadership is a critical driver of organizational efficiency and effectiveness. The following goals and actions have been identified to support the Quality of BCACS Foundation Staff Leadership key success factor.

Goal 1: Expand professional development opportunities for staff

- A. **Staff training.** Ongoing staff development is important to the growth of any professional. We will set specific training requirements for staff, including sending/exposing the Development Director and appropriate staff to fundraising, planned giving, RaisersEdge, and grant writing training.
- B. **Quality transition.** Seasoned board members and staff possess a wealth of knowledge and experience about the operation of the Foundation. To ensure a quality handoff of responsibilities, we will ensure specific training opportunities with Kathy and certain board members for the new Development Director.
- C. **Donor management.** Clearly understanding donor history, his/her preferences and interests, is critical to quality long term relationships. We will retain pertinent donor information for ongoing stewardship of donor relationships. All donor history is and will be kept strictly confidential in files and the Raiser's Edge data base.
- D. **Staying current.** As part of quality professional development, staff need to stay current with trends in fundraising. We will support membership and time designated for involvement in appropriate professional associations, professional networks, and software training for staff. Memberships in the Association of Fundraising Professionals (AFP) and Calhoun County Estate Planners Council are essential along with attendance at meetings and reading materials to stay current on what is going on in the field as well as learning from others.

Goal 2: Develop positive constituent relationships

- A. **Connections.** The Foundation is successful due to strong relationships with donors. We will ensure the introduction of trustees and staff to key donors and constituents.
- B. **Prospective donors identification.** Loyal donors are critical to the success of the BCACS Foundation. We will identify and cultivate potential future key donors using pertinent prospective donor demographics. Developing a model for analyzing potential future donors will ensure long-term success of campaigns.
- C. **Survey donors.** Donor input is an important feedback loop to guide our actions and the design of our campaigns. We will seek constituent input regarding our schools and Foundation via informal feedback and regular surveys. Electronic surveys, written surveys, and conversations with donors will be used to gather information to help improve the success of our campaigns and image.
- D. **Donor preferences.** Understanding our donors more deeply will ensure that we maximize donor participation in campaigns. We will develop an understanding of donor preferences and interests that elicit giving. This will be tracked in our files and Raiser's Edge software.

- E. **Celebrating success.** For donors to continue to give generously and to feel that their donations are making a difference, we will communicate regularly about BCACS Foundation’s role and accomplishments in the success of our schools.
- F. **Donor recognition.** Some donors appreciate a level of recognition for their generosity. We will create various ways of recognizing donors in appropriate ways. The Development Director will ensure that we fully understand and honor donor preferences with regard to recognition. This will be noted in the Raiser’s Edge software database including donor preferences for receipts and the Guardian Angel Guild membership.
- G. **Non-donor relationships.** All members of our school and larger community may choose to become donors. We will improve and maintain relationships with non-donors to encourage their involvement as contributors and advocates in the future.

Goal 3: Build excitement around BCACS Foundation goals

- A. **Strategic plan marketing.** We have worked for over a year to develop this strategic plan. It is packed with ideas for improving the Foundation. Visibility of this plan will be important to gaining momentum. We will be very visible in the rollout of this strategic plan. This plan will be summarized in an Executive Summary and made available electronically, on the website, and also as a hard copy. It will be shared with the school board, administrators, teachers, donors, parents, and other stakeholders.
- B. **Strength in numbers.** Often, Foundation events include our most loyal donors rather than a broad representation of families, staff and individuals. We need to generate more involvement in Foundation activities and will encourage more parents to contribute their time and talent to our efforts.
- C. **Branding.** Recognition of the Foundation when considering giving is important. Today, the Foundation is a silent and unknown entity for many in our schools and community. We will address this by developing Foundation branding as part of a larger marketing effort.
- D. **Annual report.** Annual reports serve as a way to increase pride in the Foundation and BCACS system. They serve as a high quality, regular communication to stakeholders. As part of a regular communication to Foundation stakeholders, we will consider reintroducing the annual report in a well-suited format. Making this available at the “State of the Schools” meeting and handing it out after Masses would minimize costs associated with distribution. It could also be available electronically.
- E. **Regular updates.** Donors and potential donors attend many events in a typical month. We will utilize these opportunities and take time at events for pertinent and quick (5 minute) updates on the Foundation.
- F. **Community connections.** There are many opportunities to get connected to our community. We will encourage staff involvement in community organizations to better expose the Foundation to the community.

Goal 4: Implement a formal process for regeneration of development plan and calendar

- A. **Past activity analysis.** Learning what works through analysis of past activities is important to future success. This happens via development of a process for post event review of activities. We will review the previous calendar and analyze what works/doesn't work and why.
- B. **Development plan.** Each year, the Foundation establishes a development plan which documents the specifics for fund development for the year. To enhance the effectiveness of the development planning process, we will form a committee to review the development plan annually, including setting specific targets. The committee and the Development Director will take responsibility for this plan.
- C. **Foundation staffing.** For fundraising success, the Development Director must focus on high value added activities. We will staff the Foundation to relieve the Development Director of activities that would be more appropriately done by others.
- D. **Development plan improvement.** We will explore new ideas for the Foundation development plan, looking at what has been effective for other fundraising organizations and professionals.

Goal 5: Expand Foundation staffing

- A. **Staffing plan.** This strategic plan has many ideas for improving the Foundation. It will require human resources to move these ideas forward. We will develop a staffing plan and associated organization chart in support of this plan.
- B. **Foundation staffing.** Increasing the number of Foundation staff will result in higher capacity for fundraising. We will seek revenue sources to support an increase in staffing.
- C. **Volunteer support.** Volunteers are an important part of the success of the Foundation. More formal volunteer commitments to assist in Foundation operations will enhance our efforts on all initiatives. We will formalize volunteer support for staff.

Goal 6: Increase level of involvement of board members

- A. **Board training.** Board members contribute to the Foundation's success in many ways, including governance. We will provide the Board with training on proper governance by partnering with a local organization.
- B. **Board commitment.** Board members must be committed to Foundation success. We will establish guidelines for board members and committee responsibilities to ensure common understanding of expectations.
- C. **Planning calendar.** The Foundation creates a planning calendar to lay out the various activities over the year. The board will be involved in the development of this planning calendar.
- D. **Board mentorship.** As we expand the number of board members, it will be important to properly orient these new members. We will implement a new board member mentor program to expedite and ensure effective orientation to the role of a Foundation trustee. The Board Chair will lead this process.

- E. **Term limits.** Boards can often be comprised of the same people for many years. This can result in the lack of fresh ideas from new members. To ensure we continually refresh the board with new members and ideas, we will study term limits for board and committee members. Board members may move to an emeritus status which will assist with the transition process.

Quality of Communications

Effectively communicating to our donor community and other stakeholders provides ongoing visibility to, and drives interest in, the Foundation as well as the BCACS schools. We must have high quality communications to achieve our vision. The following goals and actions have been identified to support the Quality of Communications key success factor.

Goal 1: Improve formal communications

- A. **Newsletter.** Regular communication to our donors and potential donors increases visibility to the work of the Foundation and success of the schools. We will develop this newsletter and coordinate this publication with the schools, allowing us to highlight school successes that donors support through the Foundation.
- B. **Third party management.** Our communications are our “face” to the world and can leave lasting impressions. We will ensure a highly professional newsletter via a contract with a third party, or appropriately skilled volunteer, to develop the publication.
- C. **Communication funding.** Quality communications requires adequate funding. To help ensure high quality and timely communication, we will seek endowment funding to support this effort long term.
- D. **Targeted communications.** There are many low cost tools available to better focus and target communications. We will utilize demographics and tools such as Constant Contact to better schedule and target communications.
- E. **Inventory current methods.** There are numerous communication channels currently in use across the school system. We will inventory and evaluate all existing communication methods in order to focus improvements and targeted communications.

Goal 2: Coordinate communications

- A. **Fundraising calendar.** Coordinating fundraising efforts throughout the year is critical to ensure that donors are not continually contacted and to improve overall “ask” effectiveness. We will develop and publish a system-wide fundraising calendar. Clubs and organizations will coordinate their fundraisers and get approval from the principals and the Foundation Director.
- B. **Activity calendar.** Similar to the fundraising calendar, we will develop and maintain a system-wide activity calendar to help raise awareness and coordinate what is happening throughout the year. Clubs and organizations will coordinate activities with principals and the Foundation Director.

- C. **Strategic plan coordination.** The BCACS Foundation Strategic Plan is adopted with respect to the activities and planning of our parishes and schools. We will maintain ongoing communication and periodic review between the Foundation, schools and parishes.
- D. **Regular coordination.** In addition to periodic strategic meetings, we will encourage school and parish board members and administrative staff to attend Foundation board meetings. This will facilitate regular and ongoing communication and coordination across the system.
- E. **Student involvement.** The voice of students is a powerful one when communicating about the impact of the Foundation on the success of the schools. We will involve students in the communication processes of the Foundation board, including the involvement of students on the Foundation board itself and or committees.

Goal 3: Educate stakeholders on BCACS Foundation

- A. **New school parents.** Parents of BCACS students are key beneficiaries of the work of the Foundation. We will schedule face-to-face meetings with new school parents to ensure that they learn about and understand the role of the Foundation in the BCACS system.
- B. **Parent connections.** To broaden understanding about the work of the Foundation and role in the BCACS system, we will ensure that board members attend the various parent meetings. We will also periodically outreach to existing families.
- C. **Seminars.** Increasing awareness of the Foundation and how it helps the schools will result in increased interest and opportunities for donors. We will host specific Foundation-sponsored education seminars that would benefit attendees (e.g. financial health seminar).
- D. **Weekly communications.** One channel of communication home happens in the elementary school Friday folders. We will develop a periodic handout or email message for these folders to help keep the Foundation work in front of parents.
- E. **High school connections.** High school students could benefit from increased knowledge and understanding the work of the BCACS Foundation. We will meet with each class to educate on the BCACS Foundation and the work we do to improve the schools.
- F. **Continual marketing.** Board members are often in situations in the community where there is an opportunity to market the Foundation. We will develop an "elevator speech" with consistent points on vision, Foundation success, reasons to donate, etc. to assist board members in this marketing.

Goal 4: Develop marketing plan

- A. **Budget.** A marketing plan will require funding to develop and implement. We will evaluate budget options for allocation to this important activity.
- B. **Marketing committee.** Quality communications requires sustained effort. To support this effort, we will establish an active marketing committee. We will utilize non-board members to assist on this committee.

- C. **Survey donors.** Donor input is an important feedback loop to guide our actions and the design of our campaigns. When appropriate, we will seek constituent input regarding our schools and Foundation via regular surveys.
- D. **Coordination with schools.** We want to ensure that the Foundation messaging is consistent with and complementary to school messaging. We will engage with the school to integrate our messaging efforts.

Goal 5: Increase Foundation ambassadors

- A. **School involvement.** The schools are a key beneficiary of the efforts of the Foundation. We will engage teachers and administrators in communicating the investment and activities of the Foundation, including fundraising.
- B. **Volunteers.** Relationships are important across the entire system. We will deliberately utilize our volunteers across the various demographics in the system to maximize message exposure.
- C. **Skilled volunteers.** There are likely parents and others in the BCACS community who possess communication skills. We will identify volunteers who have interest in communications and engaging in Foundation communication activities.
- D. **Board role.** The board, particularly with expanded committees, can play an important role in sharing the good work of the Foundation. We will actively utilize board and committee members as ambassadors for the Foundation.
- E. **Talking points.** Ambassadors actively promote the schools and the Foundation. They will need tools, such as talking points, to consistently communicate about the work of the Foundation. We will develop and disseminate these tools to Foundation ambassadors.
- F. **Expand involvement.** Ambassadors should exist across the system. We will recruit parent members from each grade level, parishioners, alumni, and other interested parties to assist in the work of the Foundation.
- G. **Board updates.** The board needs to stay connected to the ambassadors to hear about what is happening and share information to be disseminated by the ambassadors. Ambassadors will be invited to attend board meetings at least annually.

Appendix

Key Success Loop Models

Key Success Loops (KSLs) represent our current understanding about how the systems on which we are working function. These models are analysis and communication tools which facilitate teams planning including how and where to impact a system. Key success loops are made up of variables (factors), some of which are considered key to success by the team doing the analysis (key success factors). These factors are linked to each other to demonstrate how we believe they impact each other (causality).

By careful analysis of the key success loops that a team feels are important, investment points can be identified. The goal is to get the growth engines moving in the right direction (reinforcing loops--signified by R) and/or to minimize or reverse the impact of the limiting engines (balancing loops--signified by B). Investment points form the basis for a strategic plan--what we will improve and what actions we intend to take to improve.

The following key success factors were identified in the planning process:

- BCACS Foundation Revenue
- Number of Donors
- Quality of BCACS Foundation Staff Leadership
- Quality of Communications

These key success factors relate to other factors as part of our foundation "system." The key success factors were analyzed and key success loops were developed to make explicit our theory about how change might occur in the Foundation. These loops also provided focus for the team discussion and helped us determine where the highest leverage interventions might exist.

