

Strategic Plan 2014

Executive Summary

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
- Purpose
- Vision
- Strategies
- Supporting materials

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

- 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

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

Vision

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

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. These are specific strategies that will help us move toward this vision as a foundation.

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, we have identified the following goals and actions that will receive our focus this year. As a foundation, we have been intentional as to how and when to implement the goals, relying on our key success loops to make informed decisions about who, what, when, where, how and why.

Year 1 Priorities

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

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

- 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 section)

- 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)

- 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.

Contact the Foundation office or go to the Foundation website at www.bcacs.org to see the complete Strategic Plan and list complete list of goals for the next 5 years.

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