

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: President - Mark Conzemius

GOAL:

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY (2019):	TARGET GOAL 1-YR (2020):	ACTUAL 1-YR (2020):	TARGET GOAL 2-YR (2021):	TARGET GOAL 3-YR (2022):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Successful development and implementation of community partner:								
	Develop relationship with Aberdeen Catholic Foundation - pastors, board members and key consitituents	Mark, Dave	Good relationship with pastors		Trust w/pastors growing. Facilitating \$1M anonymous gift for SM parish. ACF Board considering "merger" w/CCFESD.	Complete merger with ACF, if they desire. Steward the SM anonymous gift w/campus improvements. Implementation of "2 Parishes, One Vine" initiative.	Successful launch of "2 Parishes, One Vine" initiative. Successful ACF merger with CCFESD.	+
	Develop relationship with Mitchell Catholic Foundation - pastors, former MFCE board and key consitituents	Mark, Nicole	Good relationship with pastors		Trust w/pastors growing. Completed "merger" w/CCFESD.	Continued collaboration w/pastors.	Secured charitable estate gifts for Mitchell parishes.	0
	Develop relationship with Watertown Catholic community - pastors, IC School Foundation and key constituents	Mark, Marne	Good relationship with pastors		New and retiring pastor. Minimal contact w/new pastor who is supportive	Continued collaboration w/pastors.	Secured charitable estate gifts for Mitchell parishes.	0
	Hire and train an Executive Director for the Pierre Catholic Foundation	Mark, Andrew	identified one candidate	Identify and hire an ED	Hired Maggie and implentated initial CCFESD/PCF office in Pierre	Continue to cultivate relationships with Fr. Joe and key PCF leadership as PCF/CCFESD relationship evolves w/o a GPO in Pierre. Maggie support from Hoven	Trusted partner of PCF, which is focused on parish, not just the school.	0
	Nurture relationships with the Yankton Catholic community - pastors, Yankton Catholic Foundation and key consituents	Mark, Andrew	no interest in parntership	Develop meaningful relationships. Identify benefits to YCC.	Expected implementation of partnership with MMU beginning 7/1/20. CCFESD 4/30/20 Bd Mtg in Yankton	Successful partnership w/MMU. Develop partnership that includes YCF	Invitation to visit and establish win-win partnership that includes YCF.	+
	Continue convresation with west river Catholic church	Mark	Initial conversations	Respond to DIORC & WSDCF requests	Diocese of RC & WSDCF desiring partnership	Research requests for collaboration	Collaborate / partner with DIORC / WSDCF if/where appropriate	0
Primary relationship with the office of the Bishop								
	Support Bishop Swain during these last months as our Ordinary	Mark	Bp Swain is active "Ordinary"	Successful transition for Bishop and the Diocese	Successful transtion to date. 15 board member CCFESD BOD gifted \$46,250 to "Bp of SF Endowment" in honor of Bp Swain.	Invite, where appropriate, Bp Swain in cultivating relationships and in other CCFESD activites and events, i.e. annual St Joseph Legacy Mass, etc.	Integrate "Bishop Emeritus" in CCFESD activities (where appropriate).	0
	Fulfill responsibilites of the Delegate for Diocesan and Parish Advancement for the Diocese of SF	Mark	Participate fully with Diocesan Delegates	Respected Delegate for Diocesan and Parish Advancement	Delegate for Diocesan and Parish Advancement	Trusted Delegate for Diocesan and Parish Advancement for Bishop DeGrood	Trusted Delegate for Diocesan and Parish Advancement	0

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Successful development and implementation of community partner:								
	Prepare office and board for new bishop	Mark	waiting, anticipation	Be prepared	Initial individual and team meeting with Bishop DeGrood	n/a	n/a	0
	Orientation and relationship building for new bishop	Mark	waiting, anticipation	Be prepared	Personally accompanied Bp DeGrood for day in Yankton. Initial team orientation mtg	Facilitate CCFESD BOD individual and small group listening sessions with Bp DeGrood across the Diocese	n/a	0
	Support new bishop in identifying initial objectives	Mark	n/a	n/a	Conceptual conversation	Support Bp DeGrood in putting together his vision for Diocese of SF	Clarify Bp DeGrood's vision for Diocese of SF & develop case for support	0
Prepare for upcoming CCFESD staff leadership transitions								
	Mark/President transition in 5.5 years	Mark	awareness	initial conversations	preliminary conversations	develop timeline for feedback	develop timeline & plan w/Exec Comm	0
	Peggy and Jan/Special Events retirement in next 5-10 years	Mark	awareness	initial conversations	preliminary conversations	develop timeline	develop plan	0
	Kelly/Gift Planning Specialist retirement in next five years	Mark	awareness	initial conversations	preliminary conversations	develop timeline	develop plan	0
	Barb/Data Base & Office Manager retirement in next five years	Mark	awareness	initial conversations	fully incorporated Michelle into PG, reporting to Barb	Barb mentor Michelle	Michelle fully cross-trained with Barb	0
Successful transtion of Accounting and Finance resonsibilites from outsourcing to in-house management in next 2-3 years								
	Move accounting services from the Diocese of SF to the CCFESD	Mark, Mike	Diocese of SF provides accounting services to the CCFESD	Initial conversations. Determine level of support from Diocese & CCFESD.	Encouragement & support from CCFESD Exec Comm & Bp Swain	Develop timeline and plan with the Diocese of SF. In FY2021 budget.	Implement accounting services in CCFESD.	0
	Hire CFO and support staff in 2-3 years	Mark, Mike	Diocese of SF provides CFO (Mike Bannwarth) services to the CCFESD	Initial conversations. Determine level of support from Diocese & CCFESD.	Encouragement & support from CCFESD Exec Comm & Bp Swain	Develop timeline and plan with the Diocese of SF. In FY2021 budget.	Hire CFO for CCFESD.	0

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Successful development and implementation of community partner:								
	Optimize software use for both gift counting and accounting - more staff and donor friendly & efficient	Mike, Melinda	Significant manual input & management required	Initial conversations.	Conversations only. (RE NXT has been good for Gift Planning staff.)	Research & put plan together.	After hiring of CFO, implement more efficient acctg & gift entry software & procedures & donor-friendly giving and advised fund management.	0
	Ongoing assessment of office space needs	Mark, Melinda	Segmented offices in CPF	Assess options. Maximize current space.	Staff are working in their team areas. Michelle to Gift Planning. Amanda to CFSA	Assess needs. Put appropriate plan together based on what happens with the CFO/accounting.		+
	Complete and implement an independent compliance audit	Mark, Andrew	informal legal review from volunteer committee	complete first audit			operating with full compliance to our bylaws and articles	implement independent audit on regular basis
CCFESD Board Development								
	Meet personally each year with each individual board member	Mark, Andrew, Katie, Dave, Marne, Nicole, Melinda	Some, but not all board members have personal visits.	Each board member have a visit by a staff member.	Personal meetings happening - but need assignments.	Staff have minimum of one personal visit each year with each board member.	Staff have minimum of one personal visit each year with each board member.	"-" Need to assign each board member to a staff member.
	Effective board orientation for new members	Mark, Melinda	Individual orientations as needed.	Individual orientations as needed.	Have had initial meeting with new members. Need for follow up.	Follow up, check-in visits with new board members.	Follow up, check-in visits with new board members.	"-" Need to do follow up/check in.
	Produce effective meetings	Mark, Melinda	Two annual meetings - Nov & April	Nov. mtg w/Legacy Mass & reception. April mtg in different city each year w/board strategic discussions	Effective 4/19 board meeting in Brookings & 11/19 Legacy Mass/reception	Effective 4/20 board meeting in Yankton & 11/20 Legacy Mass/reception	Effective 4/21 board meeting in _____ & 11/21 Legacy Mass/reception	0
	Communicate on regular basis	Mark	Monthly email updates	Monthly email updates	Averaging more than one email per month	Minimum of one effective email update per month.	Monthly email updates	"0" Critical that it is important, timely information
	Provide comprehensive, user friendly information monthly, semi-annually and as requested	Mark, Team	Board mtg info is comprehensive. In between info is lacking.	Effective Bd Mtg info. Put plan together for other communication opportunities.	Assessing resources. Utilizing Ellen (w/Jan's support). Identifying priorities and plan.	Monthly informative, inspiring communication with board members.	Identify and implement a CCFESD communication strategy for board members.	0

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PRIORITY AREA: Gift Planning- Andrew Bartell

GOAL:

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Manage and support gift planning team								
	Facilitate bi-monthly "Road Warrior" meetings	Andrew						
	Participate in monthly individual gift planning strategy meetings with each GPO	Andrew						
	Meet individually with each GPO each month					Monthly scheduled meeting with each GPO		
	Provide legal counsel and other strategy to Gift Planning Administrator and Officers							
	Meeting with donors and their gift planning officer to help put their estate plan together							
Build endowed funds for St. Thomas More School Brook			\$900,000	\$100,000 + \$100,000 matching funds	\$544,383 + match		\$300,000 + match	Ultimate goal of \$2 Million for STM School
	Donor Dinners with Fr. Terry Anderson & Al/Irene Kurtenbach	Andrew, Fr. Terry, Al&Irene Kurtenbach						+
	Follow up visits after dinners	Andrew						
	Follow up with those who contributed last year	Andrew						
	Promote and secure estate gifts	Andrew	0	2	2 (\$350,000)	5	6	
Create and implement next phase of Cathedral Restoration (Rectory/Organ/L			\$70k	\$3M		\$3M	\$7M goal	
	Work with Task Force (Shawn Cleary, Dan Boyum, Jessie Schmidt, Bette Theobald, Fr. Morgan)				\$1,273,756 Cash pledge, \$1,246,566 Estate gift 85+			-
	Develop case statement in accord with the vision of Fr. Morgan for Cathedral							
	Visit with potential substantial donors to the Cathedral Campaign		0	50			100	

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	Cordinate the Cathedral Task Force committee's personal visit for contributions							
Facilitate the Governance Committee								
	Cordinate the first compliance audit	Andrew, governance committee, Charlie Rogers		First audit completed	Hired legal firm (Charlie Rogers). Taking longer than expected to get started.	Completed by July 2021		"_ "
	Make recommendations to the board for changes to foundation policies							
Build relationships with new and existing estate donors								
	Manage a portfolio of 100 donors		124					
	Make regular visits with existing donors							
	Reach out to new potential donors							

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning Specialist - Kelly Bartmann

GOAL: Assist Gift Planning Team in Furthering the Mission of CCFESD

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY: (2019)	TARGET GOAL 1- YR: (2020)	ACTUAL 1-YR: (2020)	TARGET GOAL 2- YR: (2021)	TARGET GOAL 3- YR: (2022)	SUCCESS/COMMENT/STATUS: "- " Behind, "0" On Schedule, "+" Ahead
Stay current in all areas of certification/education								
	Maintain CTFA Certification	Kelly	Currently certified	Recertify	Certified !	Maintain Certification	Maintain Certification	0 On Schedule
	Continue Education re/Tax Laws, IRS Requirements	Kelly						0 On Schedule
	Web-based subscription to National Business Institute to attain 45 credits in each 3 yr cycle	Kelly	14.75 cr	30.25 credits for renewal Jan 2020	Completed 45 credits by December 15th (Whew!)	Continue to pursue credits needed for next certification date.	Complete 45 credits for renewal Jan 2023	0 On Schedule
Maintenance/Tracking of Outstanding Estates								
	Maintain spreadsheet/tracking of donors with estate pledges	Kelly						0 On Schedule
	Track Deceased donors with Pledge Balances and complete necessary follow-up	Kelly/Barb			3			0 On Schedule
	Maintain tracking of donors for whom CCFESD is Personal Representative	Kelly			11	Establish attribute/tracking tool for PR status		0 On Schedule
Trusts/Annuities/Tax Returns								
	Calculate and monitor annual quarterly trust distribution amounts				Preparing for 1st quarter 2020 distributions	Continue working with Mary Dally/TCFllp on annual calculations	Continue working with Mary Dally/TCFllp on annual calculations	0 On Schedule
	Preparation/transmittal/signing/mailing of Trust Tax Returns	Kelly/Barb			Done for 2019!	Continue working w/Mary Dally/TCFllp on annual tax returns	Continue preparation of annual tax returns	0 On Schedule
Increase Farm Commodity Gifts								
	Meet with grain elevators to establish accounts w/CCFESD	Kelly	14	25	17	25	25	- Behind...take more time to work on this effort

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	Determine current/possible commodity donors (farmers)	Kelly/Barb	No tracking	Establish database/attribute		Establish database/attribute for tracking	Make good use of tracking	- Behind...take more time to work on this effort
	Educate donors on commodity gifting opportunity by mail and/or social media	Kelly/Andrew	Postcard to known donors	Add'l info to broader base			6 Social Media posts or mailings/yr	- Behind...take more time to work on this effort
	Transition these donors to appropriate gift planners for gift development	Kelly/PG Officers	Some referrals	4/yr			6/yr	- Behind...take more time to work on this effort
Back Office for Gifts of Stock/IRA's								
	Gifts of Stock	Kelly/ Barb/ Michelle			60			
	IRA Gifts				85			
Be available as needed for Back Office Support								
	Phone/Mail/E-mail discussions and requests from Gift Planning Officers Provide Agreements for Trusts, Endowments, Agency Accounts, Annuities	Kelly	Available as much as possible	Establish "system"	Weekly Thursday appt w/Dave works very well for me. Others call as needed	Visit w/PGO's & determine if schedule to discuss needs weekly will work		
	Provide Agreements for Trusts, Endowments, Agency Accounts, Annuities. Prompt turnaround for requested assistance/documents	Kelly	Organizing	Develop tracking system to monitor each community offc specific needs	Color-coded folders and specific days to concentrate on community offices	Always room for improvement.		
Inter-Office Relationships								
	Maintain close working relationship with Finance Department	Kelly			Great rapor and sense of mutual respect	Continue		
	Be a "Rules & Regs" resource as much as possible	Kelly/Andrew			Source for B. Rezac, K. Katol, parishes, pastors	Continue		

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Clean Annual Independent Audit								
	Maintain file content to ensure Auditors receive accurate information	Kelly/Barb/ Andrew				Verify backup documentation is readily available as necessary in all files		
	Ensure proper/current IRS forms are used when needed	Kelly/Andrew				Ongoing - changes regularly	Ongoing - changes occur often	
	Review files for content/accuracy				Some review has been done-mostly as we come across files in daily use.	Be more purposeful in reviewing all estate files		
Establish Transition plan for 2023 Retirement								
	Determine need, and if needed, determine training requirements	Kelly/Andrew/ Mark				Determine Training	Determine candidate(s)	

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Pierre/Hoven - Maggie

GOAL: Further the mission of the CCFESD through charitable estate gifts from people living in the northwestern region of the Diocese of Sioux Falls

STRATEGY:	ACTIVITIES:	WHO:	BASELINE 2020:	TARGET GOAL 1-YR:	ACTUAL 6Months:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Build endowed funds for the Pierre Catholic Community								
	Build an understanding of endowments	Maggie, Fr. Joe, PCF Board	Establishment of St. Joseph School Endowment	2 Endowed estate gifts	2 developing endowed gifts			Lot of work still to be done in building awareness of endowments.
	Build awareness of Pierre Catholic Fdn.	Maggie, Fr. Joe, PCF Board	Little Awareness	Presence at parish and community events	Awareness amongst Parish and School Community	Be known as the local Catholic giving option		Built good awareness of PCF.
	Secure gifts for St. Joseph School Endowment	Maggie, PCF Board	\$60,000	\$180,000	\$120,000		\$1,000,000	Ultimate goal of \$2 Million for the St. Joseph School Endowment
Build relationship with St. Anthony Foundation								
	Investigate possible merge of the St. Anthony Foundation with CCFESD	Maggie, Dave, Fr. Schmidt	Fr. Schmidt is on board with merger	Merger complete	scheduling a meeting to begin merger process			Expect it will happen, but things move very slowly in Hoven.
	Help make the connection that "Sioux Falls" wants to help Hoven to thrive	Maggie, Fr. Schmidt	skeptical	Show benefits for community through merger, checks rcvd, etc.	skeptical	Invite parishioners to consider investing with CCFESD		Merger is an opportunity to build awareness and trust with CCFESD
	Build partnership with Father	Maggie	developing relationship	Father utilizing foundation funds for various projects and updates	Willingness to work with CCFESD in merger	Father promotes foundation to parishioners		
Have an end of life seminar with each pastor I work with								
	Pierre	Maggie, Fr. Joe	completed					Fruitful, but stressful. Follow up likely 2-3 personal visits.
	Miller	Maggie, Fr. Paul	completed					70 people attended (45 follow ups) 40 people attended
	Mobridge	Maggie, Fr. Bill	meeting schedule to discuss opportunity	EOL complete scheduled	awaiting completion of another Parish program before scheduling seminar			Father is currently focused on ALPHA program at parish. Interest in EOL when that slows down.

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	Gettysburg/Onida	Maggie, Fr. Kopal	no relationship	develop relationship	3 contacts made			
Build consensus on the PCF Board as to the vision and mission of the PCF								
	Facilitate a session with Fr. Joe and Mark or Andrew to develop Fr. Joe's vision for the PCF	Maggie, Fr. Joe, Mark, Andrew	Confusion	clear defined vision that Fr. feels comfortable sharing	no change			waiting for opportunity to schedule face to face meetings
	Schedule a planning session with the PCF Board to develop (own) a vision, mission and values statement for the PCF	Maggie, Fr. Joe, PCF Board	lack of unity in vision and success	Unified vision of what success looks like for PCF	no change			waiting for opportunity to schedule face to face meetings
	Individual meetings with key PCF board members, inc. Board Chair	Maggie	developing relationships	meet with each member 1-2 times per year	have met with 2 members			
Build CCFESD relationship in Miller								
	Establish Parish Endowment	Maggie, Fr. Paul, The Gilks	Endowment written and verbal acceptance	signed and donations contributed	signed			planning to speak to Parish community when possible to encourage gifts
	Create endowed funds in community	Maggie	none identified	2 endowed estate gifts secured	1 estate gift secured			
	Identify potential board members from Miller	Maggie	none identified	identify prospects	none identified	invite to board		goal established 3/1/2020

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Sioux Falls Deanery - Katie Fritz

GOAL: Further the mission of the CCFESD through charitable estate gifts from people living in the SF Deanery

STRATEGY:	ACTIVITIES:	WHO:	BASELINE 2019:	TARGET GOAL 1-YR:	ACTUAL 1-YR: March 2020	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Connect with New and Existing non-Estate Donors		Katie		48 (4 new donors/month)			100	
	For donors in the SF Deanery who do not have a charitable estate gift, invite them to consider including it in their estate plan	Katie			Portfolio of 333 / focusing on 171 over 70 and Top 20 from RAP. 300+ actions since March 2019.	20 meaningful touches per month x 12 = 240		Behind? grateful for NXT and getting myself more organized and with a plan. I am keeping on pace or more with donor visits and interactions of at least 20 meaningful "touches" a month.
	Introduce donors to the new bishop							Looking forward to this / need to have a "why" to get together
	Coordinate parishioner contact with their pastors	Katie			not really happening	Have a list from each pastor in SF deanery of potential estate plan prospects		I should be making contact with the pastors at least 2-3 times a year
	Thank donors with a Call, email, letter	Katie			yes			doing this consistently
	Personally contact CFSA top donors for SF Deanery	Katie, Barb			did this via email/phone and note on endowment statements			need a better plan and more time
	Share EOL Guide with Professionals	Katie		24 (2/month)	2	4	8	Behind - have not gotten a plan together to do this. This is a marketing strategy that hasn't been implemented.
	Share EOL Guide with Donors	Katie			24	24		Have shared book with or will share book with about 24 donors that attended seminars. Learned from first presentation and implemented successfully in second session. St. Therese and Holy Spirit.
	One meaningful touch each quarter (4/yr) with existing major gift donors/year (birthday cards, Easter cards, Legacy Society, events)	Katie, barb, Michelle			Started in Dec. 2019	Continue!		sending b-day cards and sent valentines to single women

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PRIORITY AREA: Gift Planning, Sioux Falls Deanery - Katie Fritz

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	Coordinate with Special Events to identify donors to invite and host at each event	Katie, Peggy						Need to better identify who I will seek out at these events and be more purposeful in following up
	Personally connect with Legacy Society donors - "solicitor" assigned by GP staff, Barb assigns in BB data base	Katie						Need to have a plan for this.
	Connect with OLOF people about bequest in Will	Katie		12 (1/month)	4 visits	12		I have had visits with some. But haven't gotten confirmation that there's a bequest in their will. Need a plan!
	Set up appointments to deliver distribution checks/EFT and/or EOL Planning Guide for Catholics	Katie			So much fun!			Look forward to this every year. Need to bring along the EOL Guide again and encourage parishes to host a seminar
Help each parish in deanery create "drought-proof" plans using their wish lists and current budgets			16	16			16	
	Offer to meet with parish/finance councils	Katie			0	8	8	Need to get a plan together!
	Work with Pastors to identify and strategize about contact with their parishioners/donors	Katie			Communicated with each pastor as to who I was contacting regarding CFSA calls etc.	Each pastor will be giving me names of potential estate planning donors from their parish	8	Need to get a plan together!
	Share EOL Guide with Pastors/Parish	Katie			2	4		St. Therese and Holy Spirit
Support Perpetual Adoration Sisters to become self sufficient			Annual Contr./1/19 contract renewal			No contract necessary		
	Monthly meetings with Sisters	Katie		12	8	6		Every other month should be sufficient
	Major Donor receptions	Katie, Sisters		4	0			goal is to have them summer 2020
	Final pledge payment acknowledgements	Katie						43 pledges left to collect
	Bi-annual Newsletter	Katie/Brianna	2	2	3	3	0	They will probably need help going forward
	Processing of donations/gifts	Barb,Michelle						
	Monthly emails to donors to remind of prayer and prayer requests	Katie/Kevin	12	12	2		0	Need a plan and time to do it!
	Work with Sisters/Diocese to open gift store	Katie/Matt/Cindy						Done!

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PRIORITY AREA: Gift Planning, Sioux Falls Deanery - Katie Fritz

GOAL: Further the mission of the CCFESD through charitable estate gifts from people living in the SF Deanery

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	Misc. projects as needed	Katie						Stations of the Cross/Donor Wall/Prayer Cards/ Banners/ Bountiful Blessings
Improve overall perception/brand awareness of CCFESD in Sioux Falls								
	Brand marketing	Katie						Would love to see us have a plan. Not just tasks to check-off for the year.
	Educate general public on CCFESD mission & vision	Katie			1			Marcy Heim event
	Continue to be involved in the life of my local parish and community	Katie			Yes			HS Parish Council / Catholic Family Services Board/ McKennan EMHC
	Live the life I'm promoting - be authentic - gain trust through actions	Katie			Certainly!			I can see trust and familiarity building with people in the community. They know what I do better. 3 plus years distance from the schools is helpful.
	Attend more deanery parish events when appropriate Connect with parish secretaries and pastors	Kate				once a quarter		This is tough for me to get to more parishes. I do see many of the priests out and about. I would like to know the parish secretaries better.
	Association of Fundraising Professionals/Networking	Katie			6			I attend about half of the meetings and it is good networking. Not always able to get notes done after meetings to share with the rest of the team.
	Find/write stories about deanery and donors	Katie	0	4	4 or so	as needed		I did do some writing for AR for Jerry . Happy to do more. Just need to know the plan and to find time.
	Be a resource and team player with CPC staff/departments	Katie			Yes			CFS Board / helping office of D&E
Continue to foster and nurture BOGCS Foundation relationship								

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STRATEGY:	ACTIVITIES:	WHO:	BASELINE 2019:	TARGET GOAL 1-YR:	ACTUAL 1-YR: March 2020	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
	Monthly contact and/or meetings with Michelle Katen/Nicole Brun	Katie	12	12	6	6		Nicole is really starting from ground zero. Trying to help educate her as best I can.
	Invite to events	Katie/Events team			Yes			Had a great experience at Nov. Board meeting and C@C
	Facilitate review of fees on funds managed by total amount				Yes			Be an ongoing resource
	Deliver distributions of endowments/thank yous	Katie			Yes			Great opportunity
	Meet with donors together when appropriate	Katie/Nicole				Possibility		We have started to discuss. Will see where it goes
Establish charitable estate plans with all CCFESD Board Members (& Board Emeritus) who live in Sic			2	4			11	32 Total Emeritus and Current Board Families
	Use End of Life Planning materials				They all know about it			Need a plan to get this going.
	Have lead members host other members for private gatherings in homes							After April Board Meeting 2019 not seeing SF Board members wanting to do this
	Call to set up time to meet and have individual conversations		0	4	7			Have had personal meetings with Board Members. Plan to meet one on one yearly with all of them.
	Have follow up conversations (with Andrew and board members) as appropriate							Realizing the need for follow-ups and sharing of knowledge more and more.

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Mitchell Area - Nicole Fuhrer

GOAL: Further the mission of the CCFESD to establish endowments for the ministries of the Mitchell Catholic Community & Deanery

STRATEGY:	ACTIVITIES:	WHO:	BASELINE 2019:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Complete Matching Grant Endowments with MFCE Matching Funds			\$20k	\$60k	\$32,500	\$60k	n/a	3 -\$5K & 1 -\$2.5K matches in process
	Make Cold Calls to daily mass attendees	Nicole						
	Get list of top contributors from pastors/business managers	Nicole						
	find a new match donor for new endowments							
	Have Barb run query for CFSA giving	Nicole/Barb						
	Get list of top contributors & families who pay tuition in full from school	Nicole/Jill						
	Work with School Principal, Business Manager & Dev Director to have a shared mission @ Teacher Salary Endowment (similar to IC School/Watertown)	Nicole/Robin/Renee			\$18,189.35			
Establish charitable estate plans with all CCFESD Board Members (& Board Emeritus) who live in Mitchell			0	3	0	3	4	
	Use End of Life Planning materials	Nicole/Andrew						
	Have lead members host other members for private gatherings in homes- see personal notes							Donors have agreed to host
	Call to set up time to meet and have individual conversations		0	4	2	4		Donor - made immediate gift this yr & established endowment in prep for estate gift: Muth established endowment with largest 1 time cash gift, have agreed to have discussion & host in home
	Have follow up conversations (with Andrew and board members) as appropriate							
Establish charitable estate plans with all MCF Board Members (including priests)			0	5	0	4	8	
	Use End of Life Planning materials	Nicole/Mark						
	Have lead members host other members for gatherings							
	Call to set up time to meet and have individual conversations				1			Longtime board member has agreed to host MFE bd in their home
	Have follow up conversations (with Andrew and board members) as appropriate							
Meet with all pastors in my deanery/service area to discuss drought proofing goals for their parishes			8	12				
	set up appointments to deliver distribution checks/EFT and/or EOL Planning Guide for Catholics	Nicole			12	12	12	
	offer to meet with parish/finance councils	Nicole						
	help them create parish "drought-proof" plans using their wish lists and current budgets	Nicole			3			Holy Family/Holy Spirit/JPII School
	offer to host end of life planning seminars in their parishes	Nicole		5	6			Held 3 workshops/1 being scheduled. Important to follow up with attendees.
	start w/ priest & councils	Nicole						

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Mitchell Area - Nicole Fuhrer

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STRATEGY:	ACTIVITIES:	WHO:	BASELINE 2019:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Improve overall perception of MCF/CCFESD - Create trust with donors								
	Educate general public on our mission & vision	Kevin/Nicole	Some individual donors don't trust the CCFESD - questioning the trust with "Sioux Falls"					Very important! weekly bulletin notes promoting a culture of stewardship, promoting the joy of giving & our mission at a local parish level- invited other non profits to Marcy Heim workshop to create relationships
	Brand marketing	Kevin/Nicole						Social media marketing almost every day. Weekly parish bulletin announcement.
	Survey perception of individuals/general public	Kevin/Nicole	TBD	Improved awareness & acceptance				
	Distribute a newsletter in the Mitchell community bi-annually	Nicole/Marketing						
	Continue to be involved in the life of my local parishes and community	Nicole						Our family recieved our local KC family of the year award for 2019!
	Live the life I'm promoting - be authentic - gain trust through actions	Nicole						Striving to live a life of stewardship myself and as a family.
Personally connect with CFSA major gift donors								
	Coordinate parishioner contact with their pastors	Nicole						How do we better manage our time
	Call, email, write donors to thank them for their gifts	Nicole			6			called donors from CFSA list Melinda sent out of donors over \$2500, just to say thank you. Get list from pastors. Follow up-next steps?
	Update CFSA donor list	Nicole, Barb						
Use the End of Life Planning Guide to meet with 4 contacts per month								
	Secure CCFESD Board Members as host couples for "End of Life Planning for Catholics"	Nicole, Mark, Andrew						
	Share EOL Guide with Pastors/Parish	Nicole						
	Share EOL Guide with Professionals	Nicole			2			
	Share EOL Guide with current donors	Nicole						
	Produce EOL seminars in parishes in my deanery	Nicole/Emily	0	6	3	6	9	Done in Huron, White Lake, Plankinton, Scheduling spring 2020 @ Salem, have reached out to 2 other priests
	Follow up with EOL attendees to go through book together	Nicole				12	24	
	Query list of 70+ donors & idenitfy prospective visits with their pastor	Nicole/Barb						

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Mitchell Area - Nicole Fuhrer

GOAL: Further the mission of the CCFESD to establish endowments for the ministries of the Mitchell Catholic Community & Deanery

STRATEGY:	ACTIVITIES:	WHO:	BASELINE 2019:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Connect with existing donors in Mitchell Deanery								
	Work with Pastors to identify and strategize about contact with their parishioners/donors	Nicole						
	One meaningful touch each quarter (4/yr) with existing major gift donors/year (birthday cards, Easter cards, Legacy Society, events) - enter these as actions in RE and make recurring, add to calendar	Nicole/Amanda						learning how to track this in RE
	Coordinate with Special Events to identify donors to invite and host at each event	Nicole/Peggy			2	2	2	hosted a sold out Christmas at the Cathedral bus, hosting a group for Gift of Hope
	Personal connect with Legacy Society donors - "solicitor" assigned by Andrew/GP staff, Barb assigns in BB data base	Andrew, Barb						
	Personally dictate into RE app Notes Tab	Nicole						Getting much better at using RE NXT
	Set up actions daily in RE NEXT	Nicole				261	261	each weekday of the year
	Have touch point events with local parishioners with/on behalf of pastors to build trusting relationships	Nicole/ Fr Ken/Fr John			13			Monthly stewardship brunches w/ Fr John @ Holy Spirit, bus trip to BroomTree for retreat, Weekly womens bible study @ Holy Family Church
Make 20 meaningful contacts each month with donors						20	20	
Continue Mitchell Catholic Foundation Annual Fund Drive								
	run report of 2019-2020 gifts	Nicole/Barb						
	Use donors of fund drive to build relationships and establish potential estate	Nicole						
Completed Goals:								
Complete Transition from MFCE to MCF completely								
	Reconcile all accounts to 0 balance	Nicole	23 accounts	25	25			merger complete, all assets transfered
	transfer money from checking account to.....?		0	1	1			transfered bal. to advised fund
	transfer money from advised fund to.....?		0	1	1			using adv fund for matches
	transfer KofC life insurance policy from MFCE to MCF.	Nicole/Tom B.	0	1	1			need to get updated copy- drama!
	dissolve corp.?	Nicole/ Andrew	1	0	1			merged corp (not dissolved)

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Watertown Area - Marne Hult

GOAL: Establish endowments for the ministries of our diocese in the Watertown Deanery Region

STRATEGY:	ACTIVITIES:	WHO:	BASELINE 2019:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Raise the final \$624,020 to complete the IC School Teacher-Staff Endowment			\$918,285	\$1,350,000	\$1,079,557	\$1,350,000	\$1,700,000	Behind but raised \$161,272 this year
	Secure planned gifts for IC School	Marne			\$1,300,500	\$1,350,000		Ahead
	Continue to work on identifying a strong donor/donors to be a 1-for-2 match for remaining \$620,443	Marne	3 prospects		3 declined at this time			Have had two prospective donors decline to be the matching gift doners
	Continue to ask parishioners to tour IC School and prayerfully make a gift to the IC School Teacher's Salary Endowment	Marne	3 prospects/mo.	3 propects/mo.	15 donors toured school	15 donor tours	3 prospects/mo.	On schedule
	Work with Carol Dagele on identifying individuals who have a connection to IC School for gift	Marne, Carol	tour school 4 times/mo.	tour school 4 times/mo.	meet with Carol each month	tour school 4 times/mo.	tour school 4 times/mo.	
	Review top 10-20 prospects who met with in past to ask feasibility study questions	Marne, IC School leadership committee			Currently in process			In process
	Update IC School newsletter...We Need Another CHAMPION for a match gift!	Marne, Kevin	2 newsletters/yr.	2 newsletters/yr.	2 newsletters	2 newsletters	2 newsletters/yr.	On schedule
	Follow up with current donors to secure additional donations	Marne			99 gifts this past year			
Establish charitable estate plans with CCFESD Board Members who live in the Watertown Deanery			1	5			7	
	Meet individually with current and past Board Members who already have an endowment with the Foundation	Marne			Met with 2. One serious considering.			
	Ask board members if they would prayerfully consider having a provision in the estate for their church and other ministries	Marne			2	3		
	Send a thank you note after the board meeting to each board member thanking them for attending	Marne			5	5		
	Use End of Life Planning Materials & gatherings	Marne		3	Met with 3. One board hosting in	2		
Meet with pastors in the Watertown Deanery to discuss a "future full of hope" vision for their parishes			0	9			18	
	Offer to set up meetings with parish finance councils to education them on what the CCFESD can do for the parish	Marne			1	8		
	Make a personal delivery of the distribution checks/EFT documentation to each parish	Marne			8	9		
	Encourage priests to actively participate in relationship building with parishioners	Marne			8	9		
	While visiting with the priests, ask if there are parishioners they would want us to visit ...	Marne			8	9		
	Offer to host End of Life Planning Seminar w/planning guide in their parish	Marne			4	5		St. Mary's Clear Lake 35 attended
	Help priests create drought proof plans using their wish list and current budgets	Marne						

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Watertown Area - Marne Hult

GOAL: Establish endowments for the ministries of our diocese in the Watertown Deanery Region

STRATEGY:	ACTIVITIES:	WHO:	BASELINE 2019:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Continue building relationships with new and existing donors by reaching out to them in various ways			4 new donors/mo.	48	44 people	48 people, 240 meaningful contacts	100	
	Make periodic phone calls and followup calls throughout the year	Marne						
	Remember them on special occasions...memorable touches on their anniversary, birthdays, Easter cards	Marne						Bishops Bulletin for Anniversary and Birthdays
	Invite donors to our events... Bishop Fishing Tournaments, Golf Tournaments, Christmas at the Cathedral, etc.	Marne			54 people on Watertown bus to Christmas at the Cathedral	Organize bus from Watertown to Bishops Fishing		Successfully organized a bus last three years for C@C
	Continue attending daily mass on Wednesdays at Holy Name/coffee social time gathering with parishioners	Marne						
	Make "Cold Calls" to people in our parishes	Marne						
	Compile a list from a query in our Deanery areas to make calls to potential donors	Marne						
	Continue being involved in the faith life of my local parish and community	Marne						
	Work with priests to identify and strategize about contact with their parishioners/donors	Marne						
	Educate general public on our mission and vision	Marne, Kevin						
	Meet with donors who have endowments to share their annual statements	Marne			24 face to face visits	24		
Establish a greater presence for the Catholic Community Foundation in the Watertown area								
	Be active in the parish communities while attending events that are part of each parish	Marne						
	Organize community education events at area parishes providing information to the general public and parishioners on our mission and vision	Marne						
Use End of Life Planning Guide to help donors with their estate plan			2/month	24			72	
	Share EOL Guide with Professionals	Marne	0	12	12	12	36	
Establish charitable estate plans with all IC School Foundation Members (including priests)			1	5			10	
	Use End of Life Planning Guide for Catholics materials	Marne						
	Have lead members host other members for gatherings							
	Call to set up time to meet and have individual conversations							
	Have follow up conversations (with Andrew and board members) as appropriate							
Cultivation- Establish new charitable estate plans from new and existing donors					6			\$3,161,670.00
								(Includes \$1.3M for IC School)
	Use End of Life Planning Guide for Catholic materials	Marne						
	Use Leaving a Legacy Information	Marne						

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Abedeen Area - Dave Vetch

GOAL: Implement Leadership Development and Leadership Gift activities of the "Two Parishes, One Vine Initiative" in the Aberdeen Catholic community

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Cultivation Strategy "Cold Calls"/visits of age-specific parishioners								80+ year olds: 153 at Sacred Heart; 140 at St. Mary's (47% could not reach, 15% declined visit, 38% agreed to visit)
	Hand-pick the 20% of 60-69 year old parishioners to contact. Send intro letter/cold call.	Dave			15	15	30	30 HHs in 60-69 age to include in "2 Parish,One Vine" Converation
	Promote stewardship message, with encouragement for all to seek that "next step" in their faith journey	Dave						
	Ask each parishioner "to consider the Church like their children" in their estate plan	Dave						
	Document the visits and consistently record metrics to visits	Dave						
	Coordinate with "home-bound ministers" to gather helpful information about parishioners	Dave						
	Follow-up with the 104, already visited 80+ year olds	Dave	104		20	20	40	Following up with those initially visits should result in building more trust with updated information
	Follow-up with the (?), already visited 70-79 year olds	Dave			20	20	40	Same
	Follow-up letter from pastor to those who can not contact	Dave						
Cultivation -Establish charitable estate plans with CCFESD Board & Emeritus members who liv			2	3	2	3	9	Wolf, Samson, Feickert, Campbell, Jewett, Kolker, Thares, King (Schaefbauer, Fr. Lichter complete)
	Meet individually with current and past Board Members who already have an endowment with the Foundation	Dave/Mark						
	Ask board members if they would prayerfully consider having a provision in the estate for their church and other ministries	Dave						
	Have follow up conversations (with Andrew/Mark and board members) as appropriate	Dave/Andrew						
	Send a thank you note after the board meeting to each board member thanking them for attending	Dave						
	Use End of Life Planning Guide for Catholics materials	Dave						

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Abdeen Area - Dave Vetch

GOAL: Implement Leadership Development and Leadership Gift activities of the "Two Parishes, One Vine Initiative" in the Aberdeen Catholic community

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Cultivation - Establish charitable estate plans with all ACF Board & Board Emeritus Members (3	3	2	3	10	Dcn Mehlhaff, Fr. Griffen, Wiesz, Schwab, Braun, Reede, Morgan, O'Keefe, Weber, Hammrich, Van Orman, Crawford, Conzemius (Schaeffbauer, Fr. Lichter, Smith complete)
	Use End of Life Planning Guide for Catholics materials	Dave						
	Have lead members host other members for gatherings							
	Call to set up time to meet and have individual conversations							
	Have follow up conversations as appropriate							
Steward - Support the NSU Newman Center development activity								
	Support NSU Newman Center Advisory Board bi-annual meeting	Dave	2	2	2	2	6	
	Make personal donor visits with Priest Director/Campus Minister	Dave	20	10	10	10	30	Build new Plan with new Campus Minister
	Monthly visit with Campus Director	Dave	0	0	2	2	36	
	On-site support of the annual phonathon	Dave/Melinda	1	1	0.5	1	3	mini-phone-a-thon with new Director
Cultivation - Establish new charitable estate plans from new and existing donors			17	5	2	3	10	
	Make periodic phone calls and followup calls throughout the year on Rating 1 -NXT	Dave						
	Remember them on special occasions...memorable touches on their anniversary, birthdays, Easter cards	Dave						
	Invite donors to our events... Bishop Fishing Tournaments, Golf Tournaments, Christmas at the Cathedral, etc.	Dave						
	Continue attending daily Masses at SH, SM, Newman & Presentation	Dave						
	Compile a list from a query in our Deanery areas to make calls to potential donors	Dave						
	Volunteer for hosting funeral dinners	Dave						
	Work with priests to identify and strategize about contact with their parishioners/donors	Dave						
	Educate general public on our mission and vision	Dave, Road Warrior work						
Cultivation - Use End of Life Planning Guide to help donors with their estate plan								

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Abedeen Area - Dave Vetch

GOAL: Implement Leadership Development and Leadership Gift activities of the "Two Parishes, One Vine Initiative" in the Aberdeen Catholic community

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
On-going	Hold EOL seminar in each Aberdeen parish		0	1	2	1	3	Priests have approved an announcement on a weekend Mass schedule
Introduced	Hold EOL seminar in deanery parishes			2	1	2	6	Redfield, Groton, Bowdle/Hoven, Ipswich
On-going	Share EOL Guide with Professionals	Dave		6	3	3	10	
Cultivation -Manage the ongoing activity of the "One Vine - Two Parishes" vision for the Aberdeen Catholic community								
Developed	Continue to work with Fr. Griffin and Fr. Lichter to shape a comprehensive, common vision	Dave, Fr. Lichter, Fr. Griffin						
Developed	Formalize vision and donor menu to point where it can be used with major gift donors	Dave						Maximize the opportunity from \$8M estate gift for SH parish
Developed	Continue to invite Catholic Community ministry activities in Parishes to build common vision.	Dave, Fr. Lichter, Fr. Griffin						
Completed	Listening Sessions	Dave						Parish Leadership/Mission groups
Initiate	Development of Leadership and Leadership Gifts	Dave/Priests/ACF Board						
	Develop strategy to invite 52 parish potential leadership roles	Dave		10	10	12	30	
Implement	St. Mary's Leadership Gift opportunity	Dave/Fr. Griffin			\$1M inspirational gift	Another \$1M inspirational gift	\$3-4M total, inc inspirational gifts	
Stewardship - Annual Visits to existing Endowment, Key Agency Acct, and DAF donors								
	Sept -Oct intentional schedule to deliver annual statements	Dave	?15	15	15	15	45	Invite all to planned gift to support their endowment
	Utilize EOL Material	Dave						
	Ask each to prayerfully discern treating the Church like one of t	Dave						

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Special Events - Jan Feterl, Peggy Gough, Krista Vandersnick, Ellen Keena

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
GOAL: Improve Efficiencies, Awareness, Attendance, and Revenue at All Events								
Collaborate with Planned Giving on all events to find opportunities for them to cultivate relationships with prospective as well as existing donors	Work closely with PG Staff to develop a collaborative plan of action. Provide attendee lists prior to each event. Work with the P.G. team to determine how to best utilize them at each event, etc.	Jan/Planned Giving Team	Providing attendee lists to some P.G. staff upon request. Working through P.G. Director on attendance at events.	Share lists of attendees to ALL P.G. staff prior to each event. Seek assistance with registration / sponsorship calls if needed.	Strong efforts were made this year to provide attendee lists to the PG staff.	We will continue these efforts with in depth input from PG staff on how we can improve upon this effort. Deeper role clarity and expectations. Schedule regular creative discussions with planned giving staff.	Solid, ongoing communication with the P.G. with everyone fully understanding expectations for their support leading up to and including at each of our events.	
Efficiencies - continue to streamline all event related tasks and processes	Event team review of all tasks and processes before, during and at the conclusion of each event to determine where we can improve and streamline tasks associated to each event and engage better efficiencies.	Event Team	Existing procedures and timelines exist.	Improved streamlined processes - with input from all team members on what we can do better, smoother and more efficiently.	Team has worked hard to utilize the Timeline and To-Do document for each event.	With Krista going on maternity leave, more processes will be documented in preparation.	Utilizing all team member's talents and skills to best fit each individual task within the event planning process.	
Comprehensive Project Management Manual	Documentation of all event tasks, deadlines, procedures and processes. This will include a comprehensive Timeline and To-Do document.	Event Team	Existing procedures and timelines exist (starting point - on-going process)	Update all documented processes and timelines throughout the individual event planning processes.	This year the manual concept has been abandoned and we've continued to document within and expand the Timeline and To-Do document.	Discontinue.	Comprehensive project management manual.	
Continue to always start with the "Why" - Beneficiary awareness	Heightened awareness regarding event beneficiaries. Deliberate focus on the event beneficiary at all committee meetings, marketing opportunities, radio interviews, and other opportunities to ensure we are always focused on WHY we do each event.	All	Current attempts to keep focused exist.	Full awareness of our beneficiaries by committee members and improved awareness by others.	It's been a strong focus all year within our committee meetings. We continue to try and weave it in to our marketing materials as much as we can.	For committee meetings, tee up the beneficiary presenters to tell a compelling story that will motivate and inspire our committee.	Consistent awareness by all committees and sponsors, always focused on why they are involved and the purpose of each event.	
Promote CCFESD and our mission at each event	Logo placement on all promotional posters and materials; ads in our event programs; promotional statements from the podium at each event (when appropriate); use of logowear; planning giving staff present and mingling at events; etc.	All	Currently include CCFESD on our materials, etc	Heightened focus and conversation with Planned Giving team on how they can fit into each event to increase exposure, etc.	At events, from the podium we've tried to ensure that there is a strong message of what CCFESD does for donors and planned giving staff continue to be invited to attend. We provide them with attendee lists so that they can see who is coming. Printed marketing materials always include prominent display of our logo ("produced by"). Printed program materials also includes ads to promote the mission of CCFESD.	Continue to provide promotion of CCFESD and opportunities for Planned Giving Staff to show/share what they do.	Ensure awareness of our community offices by encouraging them to bring guests from their respective communities to the events.	

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Special Events - Jan Feterl, Peggy Gough, Krista Vandersnick, Ellen Keena

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
<p>Social Media promotion opportunities through moving this responsibility to Krista. Over the next year, Krista to also assume responsibility for e-blast marketing.</p>	<p>Consistent & regular messaging throughout all events. Ensure our messaging "fits" with the type of event we are producing. Collaboration with Marketing to ensure timing of social media messaging don't overlap with other events.</p>	<p>Krista with Jan/Peggy Support</p>	<p>Kevin currently providing all social media.</p>	<p>Develop a content strategy that will provide consistent & regular social media messaging throughout all events. Ensure our messaging "fits" with the type of event we are producing by Krista.</p>	<p>In August, when Ellen joined the team social media and e-blast marketing responsibilities were passed to her. Ellen has created a 2020 calendar with planned content and dates that will include both events as well as general awareness of CCFESD.</p>	<p>Continue with existing efforts with Ellen working closer with Planned Giving staff to get specific desired posts/content and timelines. Expand into utilizing more platforms, IE Twitter.</p>	<p>In addition to Social Media, all other digital messaging will be assumed by Event Team.</p>	
<p>Work with Planned Giving Staff - moving all sponsors and donors up the pyramid</p>	<p>Regular discussions with planned giving team regarding status of sponsors/donors, allowing them every opportunity to connect with these individuals to discuss and encourage opportunities to move up the pyramid toward larger gifts/estate planning.</p>	<p>Jan/Planned Giving Team</p>	<p>Periodic discussions. Nothing formal in place</p>	<p>Work with Andrew to determine best practices to begin doing this on a routine basis.</p>	<p>No formal best practices were developed. However, participation/attendee lists were given to PG staff prior to event.</p>	<p>Jan will attend a Road Warrior meeting to visit with the PG team on how we can work together on getting new sponsors for events or get event sponsors to visit with PG staff. Develop a list of prospective sponsors, guests, and committee members.</p>	<p>Consistent flow of information.</p>	
<p>Proceeds / Beneficiaries - Annual discussion on who are the beneficiaries for each event. Transition operation funding to endowment funding.</p>	<p>Meet annually to discuss and review - prior to budget planning in February.</p>	<p>Mark / Mike / Jan</p>	<p>Started annual discussion in March 2019</p>	<p>Regular annual meetings - preferably in January ,to review status of each beneficiary and associated events. Determine potential changes, begin discussions with all stakeholders (ie current and future beneficiaries). Have changes in place no later than February 1st to allow for Save the Date event post card to be mailed.</p>	<p>We shifted beneficiaries in 2019 for Taste the Goodness and Notre Dame. Jan has had conversations with Mike Bannwarth and any other changes were tabled until new Bishop was installed.</p>	<p>Bring Bishop DeGrood up to speed on our beneficiaries and allow him to help us determine any desired changes.</p>	<p>This to become a regular, routine process of annual planning.</p>	
<p>Event Team conduct pre-event kick off strategy meeting</p>	<p>Establish and place dates on calendar where the Event Team will block out up to one day to evaluate the plans and timelines for the upcoming event, strategize on new concepts and assign who is responsible for each task (with goals and deadlines).</p>	<p>Event Team</p>	<p>Currently operate on a day to day basis</p>	<p>Have a concise plan of action in place at the time we begin the planning of each event. All stakeholders clearly knowing their responsibilities and tasks for scheduling.</p>	<p>The team adopted the pre-event kick off strategy meetings and feel that they are successful in helping us plan and assign tasks. We feel it saves all of us time by looking ahead to the events instead of planning day to day.</p>	<p>Continue to manage our individual workflow through the use of this practice.</p>	<p>Continuation of this plan.</p>	

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Special Events - Jan Feterl, Peggy Gough, Krista Vandersnick, Ellen Keena

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Keep the event(s) alive all year round. Ensure that each sponsor/donor/attendee recalls the reasons WHY they attended the event and the positive experiences. This will in turn help us re-engage them when the event occurs the following year.	Shoot video clips with attendees at each event - capture the positive emotion. Promote via social media, digital media and other platforms to be determined. Remind them WHY they attended and why they must return again!	Marketing / Events Team	Capturing some photos and video - need to become focused on this.	6-Month touch points on all events with past participants. Enlist a volunteer for each event to help focus on high quality promotional photography and video.	Prior to Ellen coming on board this task didn't fit into our workflow. Once Ellen joined the team, this has become more of a focus that will continue to develop. Intentionally have built into the social media/eblast calendar throwback photos and videos to help keep the events alive all year.	More messaging from our sponsors, committee and guests on their WHY. Why do they continue to give and support the event and beneficiary.	Quarterly touch points on all events with past participants	
GOAL: GIFT OF HOPE: Secure well known artist/talent, with consideration of moving to larger venue, while still maintaining the level of sponsorship and revenue for the Gift of Hope Concert.								
Secure 2020 Talent early; consider bigger name artist.	Begin work with committee immediately after the close of the 2019 GOH concert	Jan/ Team / Committee	Talent budget has been in the \$10K range	Research cost effectiveness of securing larger, more well known artist, while maintaining and/or growing the overall revenue and attendance.	Due to conflicting competition with 3 large name artists coming to Sioux Falls within 3 months of GOH, it was determined we would go another direction.	Assess success of going with a non-musical entertainment and determine if we want to continue in that direction. Once determined, start to target 2021 talent.	Continue to grow both revenue and attendance.	
Research larger facility options and costs (reception is a nice to have but not a must have)	Continue discussion with Washington Pavilion on possibilities of a "charity event" rate. Could double size of attendance and do only one performance. Consideration should also be given to remaining at the OG PAC, selling only one concert and selling out.	Jan/ Team / Committee	Currently at OG PAC	Location to be determined - outcome will be based on committee consideration of all options presented.	Jan researched pricing with both the Washington Pavillion and Premier Center and has that information on file. Once determined that we would have Jennifer Fulwiler, we didn't feel the need to expand to larger facility.	TBD once GOH 2020 wraps		
Consider moving to an earlier date - possibly end of February or perhaps to a summer concert, to avoid conflicts with other large Christian concerts.	Meet with decision makers at KNWC Radio to discuss their plans for 2020 concerts. Try to collaborate with them on concert dates, to ensure we don't overlap as we are in 2019.	Jan / Team / Committee	Currently held in March.	Determine a date that will not conflict with similar concert events in this marketplace.	We did consider, however the PAC was not available.	Continue to consider alternate dates.	Ongoing collaboration.	
Marketing strategy - review and determine changes needed to fit our marketplace	Post mortem meeting following the 2019 concert to determine what really worked for marketing and what we feel we could have eliminated. To a degree, marketing will be based on artist, date, location, etc.	Marketing / Jan		To move into the GOH concert, with a solid marketing plan that is fully executed on a timely, agreed upon basis.	With the addition of Ellen, we have developed and executed a timely, solid marketing plan.	Continue current practices developed in which Ellen will continue to own her assigned tasks.	Ongoing collaboration and planning with our marketing team.	

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Expand committee with more community connected individuals to help secure sponsorships	Work with committee, planned giving staff, CFS staff and possibly the CFS Board to brainstorm to find more individuals who are committed to the financial success of this event and are comfortable in making donation and sponsorship asks throughout the diocese.	Jan / Committee / Jerry Klein	A great 12-member committee in place in 2019, comprised of nearly all long-term members. Threat is that these long-term members are getting "tired" and may begin to fade away.	Expand committee with 4 new members in 2020	Added 3 new committee members that are well connected within the community and Catholic Family Services Board. Current committee seems more excited than ever.	Target 3 new members for 2021.	Continue to expand and renew committee membership each year.	
GOAL: FISHING: Continue to grow the Bishop's Charity Fishing Tournaments into family friendly, must attend community/regional events.								
Expand Committee Membership in Big Stone Area.	Work with current chairs to recruit membership from areas such as Watertown, Milbank, Sisseston, etc.	Jan / Big Stone Chairs	Current committee has been in place for several years and appear to be tired.	Engage 6-10 new committee members for the Big Stone Tournament.	Goal not achieved.	Encourage the Chairs to promote the committee/event and recruit 4 new members to the committee representing the surrounding communities. Possibly, work with Marne to find a representative from the Watertown area.	Continue new growth due to natural turn-over of membership.	
Broader engagement of KC Councils across the diocese	Work with KC councils throughout the diocese to increase engagement. Currently there is confusion on which support Holy Smoke and which support Fishing - with proceeds from both supporting Seminarian Education. Depending on the future of the Holy Smoke Car Show, try to integrate some of their committee members into our Fishing Committees.	Jan / Dan / Tim	Currently about a dozen KC Councils are actively involved in participation and sponsorship.	Participation (financial and attendance with fishing teams at the event) from 25% of the KC Councils in the Diocese.	Holy Smoke Car Show was dissolved in 2019. Attempts were made to reach out to the councils for greater involvement. Brought in Dan Dwire (KC) to help promote the raffle sales.	Early meeting with Dan Dwire to kick off raffle ticket sales and engagement of councils across the Diocese (may extend across the state TBD).	Participation from 50% of all KC Councils in the Diocese.	
Engage 2 new larger sponsorships, to replace revenue we know we will lose this year (2019) due to sponsorships backing away.	Work with local committee chairs to brainstorm new opportunities. Likely need to seek businesses that have a connection to fishing or a passion for seminarian education.	Jan / Committees			A Fund-a-Need match dollar donor was secured for the tournaments. They agreed to match up to \$10,000 at each location. An additional donor was secured for match dollars for \$2500 at each location.	Efforts are underway to retain existing sponsorship and grow new sponsorship revenue for 2020.		

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Add family friendly events throughout the day at each event (bouncy houses, duck pond, fishing for a prize, etc.)	Secure 2-3 families from each event location that are interested in taking on the responsibility of adding these activities. Volunteers will need to work closely with staff to secure equipment, etc, while remaining within a modest budget. Model after the events that take place at the Holy Smoke Car Show.	Event Team / Committee	No family specific events exist during the day, at this time, beyond the actual fishing events.		Due to lack of engagement by the local committees, we were unable to reach this goal.	Once again attempting to include a family friendly element that we feel may be fostered with the presence of our new Bishop.	Continued focus on growing these fishing tournaments as day-long events where (non-fisherman) family members have activities available throughout the day.	
Consolidate the raffles (Holy Smoke and Fishing) into one - resulting in higher sales, one prize pot and less confusion among KC councils.	Strategize with the Holy Smoke Car Show committee - selling ONE set of tickets and splitting the proceeds (based on sales) between the events. Note - 100% of proceeds ultimately go to Sem Ed.	Jan / Chairs	Currently sell about \$10K total in raffle tickets combined from the two fishing locations.	Increase raffle ticket sales proceeds by 20% - with combined efforts with all KC Councils throughout the diocese.	Raffles were consolidated. Timing of the drawing was not successful in accruing more sales, as we saw interest in selling tickets drop off dramatically following the fishing tournaments. A last minute push was made through the KC Councils, resulting in some sales, but did not reach sales goal.	Increase raffle ticket sales with more involvement of KC Councils and committee members by pushing the draw date back to drawing at each tournament. Increase raffle ticket sales by 20%.	Increase raffle ticket sales (using 2018 baseline) by 40%	
NEW GOAL 2020:Work with community offices to determine if its feasible to bring groups/buses to the fishing tournaments.	Work with PG Staff to provide prior attendee lists as prospects.	Event Team / PG Staff	No current activity.	NA	NA	First year: Marne/Watertown working to bring a bus for the Mass and Outdoor Dinner.	Continue efforts if successful in 2020.	
GOAL: Continued "Sold Out" Bishop's Cup Tournaments, with increased net revenue of 3%								
Sell out both courses	Active engagement of committee members to early on aggressively contact all past participants. Early marketing plan employed to ensure all past participants are aware of and save the date.	Event Team / Committee	Sold out both courses 2017 and 2018	Continued sold out courses	Goal achieved	Sell out both courses in 2020.	Continued sold out courses	
Celebrate 25th Anniversary of this event	Utilize this anniversary as a marketing tool.	Event team / Marketing	N/A	Awareness of longevity of this event.	Goal achieved	NA		
Continue to focus on next generation of attendees/givers	Secure sponsorship commitment from the 2018 Young Eagle sponsor. Actively engage sub-committee to sell-out the young eagle sponsorships for the tournament	Young Eagle Sub-Committee	Sold 25% of available sponsored opportunities in 2018	Sell 75% to 100% of available sponsored opportunities.	A concerted effort was given to focus on the next generation of committee members as well as attendees. Young Eagles increased by 50%.	Continued efforts to add 2 new committee members representing the younger generation. With efforts to also increase participants focused on the younger generation.	Sell 100% of available sponsored opportunities.	

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How to generate more revenue - with the possibility of a new short course event	Engage a sub-committee early on to brainstorm on the possibility of bringing a new event to the tournament that might appeal to a lesser serious golfer, yet someone who is interested in supporting Broom Tree and/or desiring to be a part of this event. Will need to engage TCC to discuss options and opportunities.	Event Team / Committee	No current additional event in place	To have completely analyzed the opportunities that exist and make the most fiscally responsible decision on whether or not to add an event to this already highly successful event.	Committee vetoed.	Abandoning goal due to committee's lack of interest.	TBD determined by outcome in 2019	
Engage more women to the committee - to help with new ideas to recruit more women.	Contact all 2018 female players to see if any of them are interested in joining the 2019 committee (perhaps a sub-committee). Also contact Catholic women who play league to see if there is interest and commitment.	Event Team / Committee	Currently we have 2 female committee members.	Increase female membership by 2-4 in 2019.	Goal not achieved.	Will continue to focus on this goal.	Continued focus on ensuring we have a diversified committee membership.	
Awards banquet - improve flow and attendance	Work with golf pro's to see how we can speed up final scoring tabulation. 2018 seemed slow, however perhaps due to the rain delay and participants desire to be home by a reasonable time. (Do we recruit a couple volunteers on each course to collect the cards as players come off the course.)	Jan / Committee	Typically about a full hour from conclusion of play until the final results are compiled.	Unsure what is a reasonable expectation at this time.	Goal achieved. Strong effort to collect score cards as participants came off the course. Better upfront communication with the golf pros as to how we were going to flight the participants.	Ensure we continue to work with golf pros on emphasizing the priority of quick score tabulation.		
GOAL: Relocate Legacy: A Tasting Experience to a downtown venue, with new beneficiary and expanded tasting opportunities.								
Change of beneficiary; develop relationship and seek their support with marketing and awareness	Work with members of the staff from the BDHH as well as their Development Board and full Board to determine if interest and desire exists to collaborate on this event.	Jan / Mark	Currently FBO Broom Tree		Goal achieved.	With hiring of new ED, we will work closely to ensure continued strong collaboration.		
New location - downtown Sioux Falls. Close collaboration with the DTSF staff.	Select best option for new location in the Downtown SF area. Work closely with DTSF staff on all logistics.	Jan	Currently held at		Goal achieved.	Strong collaboration already underway and will continue as we plan for 2020.		
Seek new committee chairperson	Current Chairpersons stepping down in 2019. Seek a chair that will embrace new event location and concepts, will be willing to help secure sponsorships, assist with keeping committee on track and moving forward, willing to collaborate and brainstorm new ideas with all stakeholders, all in an effort to move this event to a higher level.	Jan	Korman's have been chairs the past two years.	Secure chair that is willing to commit one to two years in this role.	Goal achieved via Melissa Howes.	Bring on a co-chair to begin succession plan for Melissa's exit.	On-going rotation of leadership through collaborative passing of responsibilities.	

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Expand committee	1) Seek out 21-40 year olds - with pulse on what this generation would like to see in this event; 2) Add members that are willing to help "carry the water" throughout the implementation of this new location (planning, set up, execution, tear down); 3) Add a few new members that are more connected in the community and are not afraid to make sponsorship asks; 4) Ensure all sub-committee areas are addressed including: Wine, Beer, Auction, Special Activities, Food, Music, Security, Set Up, Tear Down, etc.	Jan	We have an engaged committee in place, however if we expand this event as envisioned, we will need to grow the committee to include more support for all areas.	Grow the committee by 10 key committee members and 20 additional subcommittee members.	Goal achieved.	Planning already underway for 2020 event ensuring all sub-committee areas have strong leadership.	On-going rotation of strong, engaged committee members.	
Grow number of sponsorships for 2019	Set meetings with all prospective sponsors to garner their vision and interest in partnering with this event for 2019.	Jan	2018 we have \$XXX in event sponsorship dollars.	Grow our sponsorship income by \$40K for 2019	Goal achieved through collaboration with Rich Korman, new sponsorships were targeted and secured.	Grow sponsorships by 20% using new sponsorship proposal booklets. This is a chance to work with PG Staff to help engage new sponsorship interests. Work to secure sponsorship from beer distributors.	Continue growth as determined based on 2019 and 2020 event success	
Broaden the offerings of this event - such as other types of tastings, utilize food trucks, etc.	Work with committee chair(s) and each sub-committee chair(s) to determine direction we desire to take each of our event areas. Set goals based on what the committee determines as opportunities and priorities.	Event Team / Committee	Currently offer beer, wine, coffee, cheese and food tastings.	Creatively expand tasting offerings for the 2019. Some items might include food trucks, live music, games/activities, etc.	Goal achieved. Did not utilize food trucks, rather sought local food purveyors to provide food as a part of the ticket purchase benefit. Great success with games/activities	Continue to grow on the established baseline of vendor participation. Work to secure stronger partnerships with food purveyors.	Continue to determine possible growth opportunities.	
Offer new activities at the event. This would begin with the formation of an Event Activities Sub-Committee.	Brainstorm with Activities Sub-Committee to determine what they feel are feasible opportunities, that will help grow and entice new attendees. Some ideas include: Grape Stomping, demonstrations & classes, games such as bean bags and wine toss, live music, etc.	Event Team / Committee	Only activity offered at this time is the wine ring toss.	Add a variety of activities that will completely set our event apart from any similar events in the area.	Goal achieved. Secured solid game chair people. A diverse offering of activities was available to all.	Continue to grow these opportunities.	Continue to grow these opportunities.	
Review auction and determine how this should look in this new downtown location and atmosphere - desire to keep it as it is a great source of revenue, however how will it best work?	1) Meet with current Auction Committee to review past performance of the auction. 2) Grow the committee by 4-6 individuals who will be willing to work with existing committee to brainstorm and help determine the future direction of this committee to fit the downtown location. 3) Determine what items are key to the financial success of this auction. 4) Begin soliciting packages immediately.	Event Team / Committee / Auction Sub-Committee	2019 Legacy BroomTree Auction netted \$XXX	Grow the net revenue from this portion of the event by 5%	Revenue growth not achieved.	Assess what can be done differently to bring back auction interest and awareness resulting in revenue equivalent to that in 2018, if not greater.	Continued growth based on success of 2019 event.	

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Develop relationship with DTSF and work closely with them throughout the planning and implementation	1) Set regular touch-point meetings with DTSF staff to keep them in tune with all we are doing 2) Seek advice and support for areas that we are uncertain or lack past experience 3) Utilize them for marketing and awareness	Jan	This will be a new relationship	Develop a solid, collaborative relationship that will be viewed as a complete win/win.	Goal achieved. Solid relationship developed with DTSF established.	Continue collaborative relationship.	Continued collaboration and relationship.	
GOAL: Increase net proceeds of Notre Dame Experience through the sale of a minimum of 300 tickets, improved sales force, heighten awareness of the value of this trip and ensure quality marketing of auction package.								
New Beneficiary	Meet with the Board of Directors and Staff from BDHH to determine if a collaboration on this activity is a good fit for all.	Jan/ Mark / Katie			Goal achieved. BDHH became new beneficiary.	Targeting same beneficiary for 2020 and will have conversations with Bishop DeGrood with respect to 2021.		
Increased Sales Force	Work with new beneficiary on the possibility of expanding the sales force to 30 individuals - each responsible for selling a minimum of ten tickets	Jan / Mark	Current committee comprised of 8 active sales persons - however primarily falling on the CCFESD staff to sell the majority of the tickets.	Increase committee/salesforce to 30 individuals each selling 10 tickets	Goal achieved. Sold all 400 tickets. BDHH Board members were thoroughly engaged.	Continue positive relationship with BDHH board and sell all 400 tickets.	Continue to expand upon 2019 goals - based on outcome.	
Sell a minimum of 300 of the 400 tickets	Through the expansion of the committee/sales force, we will develop a strategy that will ensure a successful sales campaign.	Sales Team	2018 Sold XX tickets and netted \$XXX	Sell a minimum of 300 of the 400 available tickets.	Goal achieved. Sold all 400.	Sell all 400 again.	Sell out close to all available 400 tickets	
Improved marketing and promotion of 2nd package; Video clips from past years winners	Utilize the emotion and experiences from prior years winners to help promote the value of this package. Create a marketing awareness campaign that can be utilized on all Social and Digital media platforms. This would include video, written testimonials, photos, etc.	Event Team / Marketing / Past Auction purchasers and raffle winners		Heightened awareness via personal testimonials - resulting in increased interest in bidding on the auction package (as well as purchasing raffle tickets). Through this campaign, prospective bidders and purchasers will be able to truly SEE and FEEL themselves at this event.	Goal achieved.	Opportunity exists to grow interest and revenue on the 2nd package. Maximize opportunity to engage 2019 purchaser in marketing strategy.	TBD	
GOAL: At Bishop's Charity Hunt, increased awareness of Newman Campus Ministry as well as increase net revenue through attendance growth and non-event participation opportunities.								

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Engagement of new committee chairs. Brainstorm their visions for this event including growth goals (attendance and financial). Create a succession plan.	Meeting one-on-one with committee chairs to establish vision. Set full committee meeting where chairs will introduce their vision and goals and invite/challenge committee to come alongside them to achieve these goals.	Jan / Chairs	A regular rotation of chairs has occurred over the past 4 years. 2018 chairs held this role for two years .	Establish vision and goals of chairs. Also create a succession plan to ensure continued rotation of leadership.	Goal achieved.	Establish a succession plan for chairs through the engagement of chair elects.		
Consider doing this "In Memory of Don Dougherty" - long time supporter - to celebrate the family values and relationships born from this event!	Work with committee to determine if this is a direction they desire to take in 2019. If so, visit with family to obtain their approval and support. Develop a marketing strategy around this.	Jan / Chairs / Event Team / Marketing	New idea - no baseline	Use this as an opportunity to celebrate the long history of family involvement as well as the rich history of friendships that were born out of this event. Create an awareness and desire for more multi-generational families to participate - along with the awareness of the friendships and rich faith related experiences that come from participating in this event.	Goal achieved.	TBD - 2020 celebrate 25 years	TBD	
Increased net revenue by 10% and attendance by 10%	Work with chairs and committee members to determine avenues to increase net revenue. Some means include 1) increased attendance (growth by 10% or 7 attendees), 2) increased sponsorships, 3) increased priest sponsorships, 4) Quality Live and Silent auction packages, 5) Ghost bidders	Event Team / Committee Chairs / Committee	\$XXX 2018 revenue	Increase revenue by XXX (to be determined with collaboration of committee chairs and committee)				
Ways to increase revenue outside of the event to avoid dependence on those who actually attend event.	1) Pre-sales of deck of cards raffle (for guns) to take the financial burden off of the attendees at the event and allow them to focus on auction packages, etc. 2) Seek ghost bidders from those unable to attend. Other opportunities to be discussed with Chairs and Committees	Event Team / Committee			Goal achieved.	Will continue to encourage committee to find new ways of taking pressure off participants.		
Continue efforts to bring the next generation.	Concentrated marketing plan that would perhaps tie into the recognition of Don Dougherty and his philosophy of making this a family hunt experience.	Event Team / Committee			Goal achieved.	Continue to promote invitations to the next generation.		
Target needs of the Newman Campus Minitries	Work closely with the Newman Campus Directors and Staff to determine specific goals and objectives for this fundraising event. Make these goals tangible and attainable.	Event Team / Chairs			Goal achieved. Strong messaging at the banquet was a benefit from students in attendance and through zoom video conferencing.	Continue to work with Newman Priest Directors and Melinda to develop a list of needs.		

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Heightened marketing	1) perhaps video clips from those who are currently utilizing Newman Campus Ministry or those who have benefitted from these services in the past; 2) recreate emotions from last year through the use of photos and stories	Event Team / Marketing		Elevated awareness of this event	Goal achieved. Strong messaging at the banquet was a benefit from students in attendance and through zoom video conferencing. Thank you message from student shared on facebook.	Continue this practice at future events.		
GOAL: At Christmas at the Cathedral, increased focus on beneficiaries, increased revenue and sold out concerts.								
Continued community partnerships and involvement with Wednesday night performance	Some current suggestions include: Gifts for children attending, Fazoli's returning for meal, KNWC partnership in promoting cookie drive, better clarity of event promotional materials, extending offer and promotion to Banquet West, promote at locations such as Faith Temple Food Giveaway and increased community partnerships overall.	Event Team / Beneficiaries			Goal Achieved. (Nailed it!) With the exception of Faith Temple, we achieved all these goals. Children's Gifts were very well received. Obtained a \$2K grant from SVSW to purchase gifts.	Continued efforts to increase awareness. Will promote of Faith Temple Food Giveaway. Banquet West will be opened by this time and we will also promote there. Will attempt to get SVSW grant again in 2020. If not, seek another source.		
Valet Parking - at all concerts	Work with current value parking chairs (Boyums) to determine feasibility and reality of bringing in more volunteers.	Event Team / Valet Parking Chairs	Currently do 3 of the 6 shows. (Thursday, Friday and Saturday nights)		Did not achieve. According to Pam Boyum, Chair, they were unable to obtain enough volunteers.	Continue to try to see if we can make this happen. Considering an annual ask to the KC's Councils. Target specific groups to help (ie: CMBF, Social Minsitries Groups, etc). We feel this is worthy of our efforts.		
Develop a Fundraising Committee that would help make calls to past patrons and pew sponsors.	1) Work with our beneficiaries to obtain 2 names of individuals that would be willing to volunteer to serve on a fund-raising committee. 2) Time commitment would be approximately 80 hours during the month of September to early October. 3) Process would begin in early September. 4) Tasks would include: a) work with staff to compile an initial mailing to all past patrons/sponsors where we include a copy of what their past program ad, etc. b) Approximately 2 weeks later, conduct follow-up calls to these past patrons and pew sponsors to secure commitments, c) Document these commitments along with which performance and number of tickets they would like to receive, d) Compile list of these donors for printing in the program. (Program goes to print mid-November, so desire is to have this completed by the end of October.) 5) Additionally utilize these individuals to possibly help us secure 2 to 4 new \$5000 (or above) level sponsors.	Jan / Peggy / Amanda from BDHH and Fr Morgan from the Cathedral (to provide volunteer names)	This task is currently managed by staff at this time.	To have 2 solid volunteers in place by early September.	Attempted, however didn't develop.	With new Development Director at BDHH, will continue to work that relationship for new prospects. Will revisit opportunity to get support to help make phone calls.	Continue to maintain this level of volunteer support.	

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PRIORITY AREA: Special Events - Jan Feterl, Peggy Gough, Krista Vandersnick, Ellen Keena

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Establish a C@C Decorating Committee	Committee would be comprised of two sets of volunteers 1) Would be responsible for developing a decorating plan for the Nave of the Cathedral and 2) Would be responsible for developing a plan for the decorating of the Cathedral Hall for all patron receptions and other events during the Christmas season. Secure and garner commitment from chairs starting in June. Chairs will in turn work with staff to develop a committee to help decorate their respective areas the week of the concerts. Prospects for chairs include Jo Schallenkamp for Nave and Apollonia for Cathedral Hall. Once plan for the reception hall is developed, chair and staff will work with Hy-Vee on theme, colors, borrowed items, etc.	Event Team to take the lead on developing this committee.	We have not had such a committee structure in place in the past. Currently secure random volunteers.	Develop committee structure that will sustain well into the future. Keep in mind that chairs may desire to rotate out, so have a co-chair perhaps to ensure this model is sustainable.	Krista lead the effort with assistance from HyVee Floral. Had a great turn-out of volunteers to help decorate. We pulled a group to help decorate the St. Joseph Room for the Bishop's Receptions.	work the Matt and Tracie to establish a new group to decorate the Bishop's House. Krista to meet with HyVee prior to maternity leave to establish a floral plan and color scheme. Continued similar efforts as we did in 2019 to get a strong group of volutneers to help day of. Secure Jo Schallenkamp and the Beaners to once again lead the decorating efforts for the Nave.	Ongoing volunteer structure in place, with succession planning.	
Increase Sponsorships	Secure one more Presenting Sponsor (\$25K for Sunday evening performance), one more at the \$10K level and two more at the \$5K level. Also increase pew and patron sponsors by 5% over 2018. Start with an initial focused meeting in April to discuss prospects for larger sponsors. Create a plan of action for how we will approach them early to ensure they are budgeting for this opportunity. For the increase in Pew and Patron sponsons, hold a strategy session with the event team and perhaps some planned giving staff to develop a list of names and strategy for connecting with them. This is our opportunity to bring these folks onto the pyramid, develop the relationship and then allow planned giving staff to move them up.	Event Team with conversation with Mark and Planned Giving staff.	Currently have 5 Presenting Sponsors (with opportunity to add one more). Currently have XXX at \$10K Level, XXX at \$5K Level and XX Patron Pews and XX Patron Sponsors	Add one more Presenting sponsor, one more \$10K level sponsor, two more \$5K level sponsors and increase Pew and Patron sponsons by 5%.			Sustain existing sponsors through strong relationships, feedback and a feeling of value and collaboration.	

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Special Events - Jan Feterl, Peggy Gough, Krista Vandersnick, Ellen Keena

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
<p>Focused Strategy for Event Team and all foundation staff on how to survive concert week and roll directly into Christmas, without exhaustion (and still experience Advent along the way!) This is an important element for the overall job satisfaction primarily for the Event Team, but all so the entire Foundation Team.</p>	<p>Set a strategy meeting with Event Team. Review the above goals (such as adding committees to help secure sponsors and take charge with decorating, etc.) and develop an associated timed plan. Determine what are "must do" tasks that are needed for the Monday following C@C. Have a concise plan, with timed dates for all projects, in place in October to ensure all staff feel comfortable and positive. Build in staff "day off" in the weeks leading up to C@C to allow staff time to address personal items associated with preparations for family Christmas plans (decorating, shopping, meal preparations, etc.). Communicate this plan to the management team and incorporate how the rest of the Foundation team fit into this plan (particularly with support and assistance the week of as well as at the concerts).</p>	<p>Event Team, Mark, Management Team, Planned Giving Team, Admin Support Team.</p>	<p>We have a "week of event" checklist schedule that we work from each year.</p>					
<p>Add one more Presenting Sponsor (Sunday night performance).</p>		<p>Mark / Jan</p>						
<p>Sell out all performances.</p>	<p>Develop a strategy of how we can increase sales beyond the goals listed above. Some items may include 1) Continued collaboration with HyVee to help with sales and event awareness 2) Seek out more groups - start early on this to develop and create a proposal strategy to get into their hands to allow for planning on their end (ideas would include retirement communities, banks that do incentive bus trips, bus tour groups, parishes, etc.) 3) Review of 2018 Marketing Plan and what opportunities exist to improve overall awareness, 4) Get commitments early from all Pew and Patron sponsors before their financial resources are directed elsewhere and/or before weather conditions play into their decisions 5) What replaces the Sunday night performance dedicated to Ron Schallenkamp? 6) Other ideas to be determined</p>	<p>Event Team / Marketing / Planned Giving staff working within their own communities to secure bus groups.</p>	<p>Sold out 2018 concerts (great weather may have played a key factor along with the promotion of the dedicated Sunday night performance to Ron Schallenkamp).</p>	<p>Sell out all performances</p>			<p>Continued sold out performances</p>	

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Catholic Family Sharing Appeal/ Grant Distributions - Melinda North, Amanda Mathis

GOAL: Increase participation by 10%

STRATEGY:	ACTIVITIES:	WHO:	BASELINE 2019:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	SUCCESS/COMMENT/STATUS: "-." Behind, "0" On Schedule, "+" Ahead
Pastor Focus: Using CFSA as a way to increase annual parish income							
	Identify and invite six new pastors to work with in 2019 [1]	Melinda	54% of parishes exceed CFSA share	64% exceed share	56.% (64)	60% (69)	behind - Reflection of amount of time spent with pastors 1:1
	Coach on how to talk and communicate ministries supported by CFSA	Melinda	0 parishes		4 pastors (10 parishes)	Continue with 4; add	Groton, Beresford (3), Jefferson, Platte (2), Parkston
	Work with pastor and finance council on the message and ask of parishioners	Melinda					
	Send bi-monthly email to parishes as follow-up to monthly conversations	Melinda	0 parishes		as needed - no set schedule		Did not accomplish twice a month, but followed up when needed.
	Create communication plan to move people from giving from excess to giving from "first fruits"	Melinda	none		conversations are ongoing, but no document created.		implemented Stewardship Snippets in forum. No created document for parishes to use on their own.
	Establish stewardship communication/vocabulary	Melinda			Stewardship Snippets used in a handful of parishes.		
	Next step - endowments and estate planning with donors.	Melinda			continual conversations with priests.		
Secretary Focus							
	Send monthly reminders of timeline and to dos	Amanda	Not doing	Monthly email on schedule	Still implementing	Emails on schedule with important info for secretaries	Information was emailed as necessary but was not a standard practice between March 2019-March 2020

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	Mentor new parish secretaries on process, tracking, recording, following up [2]	Amanda/ Melinda	Currently - 5 new secretaries we know of.		7 parishes- Working with several secretaries on online giving and gift processing		JoNell - Platte, Pat - Big Stone, Dawn - Dunes, Jan - St Mary, Melissa - Bowdle, Kathy - Yankton, Carol- Brandon
	Communicate online donors to parishes monthly	Amanda	as needed	Monthly info being emailed by Amanda	Monthly info being emailed to parishes through OSV by Amanda	Practice should be continued but on the 1st business day of the following month	New practice of emailing reports through OSV instead of saving and emailing reports. By next year, these should be on a schedule of being emailed on the first business day of the month instead of being a random day in the month
	Thank and communicate whenever reports are turned in	Amanda					
	Conduct Deanery Thank You Lunches	Melinda/ Amanda	0	3			Individual, not dean 3 (5 parishes)
Promote Charitable Estate Giving							
	When in conversation with pastors, encourage the possibilities of promoting charitable estate planning, endowing parish ministries, etc.	Melinda					ongoing
	Promote End of Life seminars	Melinda	0	3	1 (Miller)		-
	Encourage invitation for Gift Planning staff member to visit individual parishioners	Melinda				Refer 5 new individuals	-
Stewardship							

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

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	Continue to research and build "tool box" for parishes (using Rapid City as example)		nothing	Create survey for parishes to utilize; create categories to focus on - Hospitality, Prayer, Formation, Service (generosity)	In progress	Establish committee (possible CFSA Advisory Board) to help formulate and critique	
	Continue to study and learn about facilitating spiritual gifts to engage parish community				Lead and participated in small group study		
	Work with parishes that would like to build stewardship and parishioner engagement within their parishes		0	2-3	1	Begin program in 1 - 2 parishes (survey to identify where to begin)	-
Grant Distributions (DAF, St Sebastian, Undesignated)			2020				
	Maintain integrity and efficiency of grant distributions	Melinda/ Amanda	Distributions within 10 - 15 business days.	Maintain or improve turnaround time		Establish procedures, including how best to communicate back to donor when distributions are made	Significant amount of paperwork and communication
	Incorporate St. Sebastian scholarship applications into the responsibility of the Board Grant Committee	Melinda/ Amanda	n/a	engage 3 grant committee members to review and approve all scholarships			
	Identify ways to celebrate the donor and thank them.						
	Research possibility of producing a "Summit" to promote giving, create awareness of ministries and engage donors.						
	Use the language- Catholic Family Sharing Appeal vs. CFSA						

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

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	Parishes aren't wired/set up for video/audio. Encourage MyParish app usage						
	Find new/updated ways to encourage giving and what the dollars are funding						
Smart							
Measurable							
Actionable							
Realistic							
Timed							

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Administrative/Database - Barb Buckmiller, Michelle Sletten

GOAL: Maintain integrity of database/Accuarate and effecient reporting

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "- " Behind, "0" On Schedule, "+" Ahead
Clean Annual Independent Audit								
A successful audit confirms we are entering suitable data and that we are able to report information in a manner that meets the required legal standards.	Maintain accuracy of data to ensure Auditors get correct information	All			SUCCESS	To meet audit requirements this goal will be ongoing		0-On schedule The audit is our "Annual Review".
	Backup documentation for all pledges	All			Improvements have been made	To meet audit requirements this goal will be ongoing		
	Audit Procedures	Barb	Current procedures are not written in a format that would be easily implemented without further guidance.	Identify Queries/Exports that are used for Audit reports and organize in a separate folder. Create correlated written procedures.				
Transition to Raisers Edge NXT								
	Partcipate in training	All		Make transition to NXT	Completed NXT required training to make transition, and maintained close contact with BB support to utilize NXT program.	Ongoing	Fully utilize NXT capabilities	0-On schedule
	Assist with training team	All			Lead team and individual training sessions	Ongoing		0-On Schedule
	Ensure data carries over properly	All			Data transfer was successful	Review duplicate spouse procedure		0-On Schedule
	Develop new procedures	All			Procedures have been established and distributed	Ongoing		0-On Schedule
	Review and update queries and reports	All			Research capabilities and flexibility of Lists	Train on feasibility and capabilities of reporting in NXT		0-On schedule

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	Test Opportunities Tab in NXT	All		Process Inspires Campaign thru the Opportunites Tab				
	Set up template Lists for Gift Planning Officers	All	Some have been created	Ongoing as needs arise/encourage use of this feature				
	Ratings feature in NXT	All	Briefly discussed with GP Officers	Clarify Capability vs Mindset/Standardize d numerical definition				
Work Efficiently/Accurately								
Streamline Reporting	Prepare reports quarterly	All		Ongoing as needed by team	Uniformity among Community Offices is developing	Identify reports that are unique and review if they can be more uniform, both over time and across offices		0-On Schedule
Query Request Form	Encourage use/completed forms	All			Continue to encourage use of form and its importance			--Behind We are not receiving detailed or timely requests, which delays our response time, increases time spent on task and opportunity for error
	Cross Training	All			Big strides have been made since Michelle's relocation to the GP office.	Ongoing	Ongoing	0-On Schedule
Analytics								
Review reports/comparisons	Take time to review reports, note giving trends and identify potential missed opportunities	Mainly Barb, Also Michelle		Ongoing as needed by team		Ongoing	Ongoing	--Behind, limited time
Microsoft Access Reports								

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Become proficient in Access Reports	Take classes/shadow Carla	Michelle			Determined that Access and not Crystal Reporting system is most beneficial for CCFESD reporting needs	Continue working with Carla and individual sef training to gain proficiency		
	Assist w/ 2019 endowment statements	Michelle		2020 Endowment Statements in house	Michelle worked with Carla and we were able to streamline some reporting criteria. Attempt to streamline one page per endowment	Ongoing	Endowment Statements and Year end receipts in house	--Behind due to new endowment distribution sheets and the required tracking of endowment check distribution. Hand delivery of checks created additional responsibilities that prevented training time
Procedures								
Write procedures	Prepare procedures for all routine administrative duties	All			Ongoing as needed	Ongoing		

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Marketing

GOAL: Develop a project management & workflow process

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY:	TARGET GOAL 1-YR:	ACTUAL 1-YR:	TARGET GOAL 2-YR:	TARGET GOAL 3-YR:	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
PROJECT REQUEST FORM								
Help create clarity around a project by using the project request form to gather information upfront.	Use created Project Request form to fully understand the needs of the client and scope of the project itself.	Stakeholders & Kevin	Has been used by Dave, and Melinda	By 2020 we will have a final version of the project request form which captures all of the necessities for each campaign or project.			By 2023, everyone in the office is using the form for every single project throughout the year. This will be updated with items to be added or taken away at the wrap-up meetings.	Determine whether the request is including Diocesan Communications team
KICK-OFF MEETING								
Help understand the duties of the assignments by having a launch meeting.	Have a launch meeting to discuss the goal of project, and establish the needs and desires of the client. This time will also be used to set the expectations of both parites.	Stakeholders (Director Level) and Kevin	Jan and Kevin have used for multiple events.	By 2020, each department will have had a kick off meeting for every project of campaign at least once.			By 2023, kick-off meetings will be happening for every project or campaign.	
MAVENLINK								
Use this tool to track the progress of the tactics and campaign.	The agreed upon information will be entered into the project management software and be used to track the progress of the project and maintain the timelines, and tactics of the project.	Stakeholders (Director Level) and Kevin	Most projects and campaigns have been entered.	By 2020 all projects and campaigns have been entered and all tactics have been defined.			By 2023, Mavenlink will be fully fleshed out and running seamlessly. All directors will understand the intricacies of the program.	
WEEKLY TOUCH-PT MTGS								
A chance for the stakeholders and marketing to discuss the campaign and strategies.	Hold weekly touchpoints with the directors of the departments to ensure the projects are still on time.	Stakeholders (Director Level) and Kevin	Jan & Kevin meet weekly.	By 2020, Kevin will hold set weekly meetings with all stakeholders.			By 2023 all meetings are efficient and worth the time.	
WRAP-UP MEETING								
Opportunity for stakeholder and marketing to come together to understand which tactics worked and which did not. This is a chance to better the campaign for next year, and	Meeting to be used to discuss tactics and strategies which worked and did not work in order to improve for next time.	Stakeholders and Kevin	Have had several meetings with the events team.	By 2020 Kevin will have had a meeting for each of the campaigns or projects we have defined.			By 2023 meetings happen for all campaigns and projects throughout the year. The Project request form will be updated with the information taken away from this meeting and used for next year's kick-off.	
GOAL: DRIVE TRAFFIC TO OUR WEBSITE								
COMPELLING CONTENT								
Create compleing content that is shared on our website and social media - which leads back to our website.	Share impact and donor stories from our events and offices around our diocese through our quarterly newsletter, which will be shared via eblast and on our social media pages, and drives people back to our website.	Planned Giving & Kevin	Only happens during annual report and check distribution time	By 2020 we will begin to have a consistant stream of stories and content which will be shared on a regular basis.			By 2023 we will be sharing these stories every quarter on our newsletter, and tease stories through our social media throughout the month. We will see an increase in readership and subscriptions to our Newsletter of 10% and 15% respectivley.	

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

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BEING A THOUGHT LEADER								
Position ourselves as being the "go-to" resource for all questions regarding planned giving across our diocese.	Share information which helps people and positions us as being a "go-to source" for information pertaining to gving, endowments, etc.	Planned Giving	Whatever we pulled from our website conversion, and to be used on our quarterly news letters	By 2020 we will have identified how to best share the information from our office to help position us as being the thought leaders within the diocese and respective communities.			By 2023 we will have the newsletter segemented so as all community officers will be featured in their own "seperate" newsletter - it will be the same information, but segmented by deanery - and sharring the newsletter within their communities to help postiomn them as being the thought leader at a local level.	
BETTER SEO								
Ensure we are at the top of all searches pertaining to what we at the CCFESD do.	Develop a full SEO strategy for each page on our website.	Kevin	Only a few pages have a fully developed SEO Strategy	By 2020 we will begin the process of transitioning all pages to include SEO.			By 2023, all pages will now have a full SEO strategy in place.	
GOAL: DEVELOP A STRATEGIC MARKETING PLAN FOR THE PLANNED GIVING STAFF FOR ALL PROJECTS AND CAMPAIGNS								
YEARLY MARKETING CAMPAIGNS								
Position the planned giving team as the number one source of information and help grow the awareness of who they area within the diocese.	Gifts of Grain, IRA Rollovers, Year-End Giving, Charitable Estate Planning, Annuities, Trusts, and all other areas in which people give to help support the ministries across the diocese.	Planned Giving Staff and Kevin	Happening, but with minimal effort from Marketing.	By 2020, have a fully fleshed out idea of all of the campaigns and have a "wish list" of tactics to be created for each campaign.			By 2023, all campaigns have a list of tactics which work well for each campaign and the campaigns are schedule and running in a timely manner.	
THOUGHT LEADER ARTICLES								
Position our planned giving staff as being the "go-to" source of all information pertaining to planned giving.	Create quartlery articles, which will be used in the quarterly CCFESD Newsletter, helping to position us as thought leaders within the diocese and our local communities.	Planned Giving Staff and Kevin	Not currenting happening.	By 2020, have someone within the planned giving team, to help share their expertise to be placed in the quarterly newsletter.			By 2023, all community officers will share the quarterly newsletter within their respective deanery and they will be the person they see as the author of the articles.	
DONOR STORIES								
Help show the impact people have across our diocese in supporting the ministries they know and love.	Create stories sharing the impact of the donors, and the beneficiaries across our diocese.	Planned Giving Staff and Kevin	Only done during the Annual Report time.	By 2020, have all communitiy officers sharing people they believe would be a good fit for people to hear about either in the beneficiary or donor aspect.			By 2023, all community officers will be have at least one story per quarter to be shared in the wuarterly newsletter and it will fall within the scope of the quarterly newsletter (i.e. the community officer will be seen as the final author and publisher).	
GOAL: GROW AWARENESS, PUBLIC PERCEPTION, & TRUST FOR THE CCFESD & ALL COMMUNITY OFFICES								
BRAND TRUST/PERCEPTION SURVEY								

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Marketing

GOAL: Develop a project management & workflow process

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Help people in the eastern SD diocese better understand who we are and help them understand what we do.	Create a survey to be shared with all priests, CCFESD board members and key stakeholders	Kevin & Gift Planning Staff	Nothing has been done yet.	By 2020 submit a survey to all priests in our diocese, CCFESD board members, and all key peoples within our communities. The goal of this survey is to have a better understanding of what our public perception is and see the level of brand trust.			By 2023, there will be an increase in the engagement, of those asked to participate in our survey, by 15%. The overall awareness, perception and trust in the CCFESD Brand will have grown by 10% accross the board.	
CCFESD NEWSLETTER								
Establish a quarterly newsletter to go out to our global email list, all priests, and key identified peoples acorss our diocese.	Highlight our ministries, distributions, and what we, as an organization, are doing across the diocese. This will help solidify us as being thought leaders and go-to resources within our communities, and the diocese.	Kevin & CCFESD Staff	Nothing has been done yet.	By 2020, we will have created a name for the newsletter, fully developed the layout of the newsletter, and started working to create stories to be shared. The stories will be created by working with our community officers to focus on their highlights within the community. We will also focus on the ministires supported by the Foundation, and help people realize we are MORE than just an events organization.			By 2023, this will have grown in overall readership, and click-thru rates by 10% from our baseline taken in 2020. We will also have a better understanding of what our readers want to see, and what we will be sharing.	
GROW BRANDED MATERIALS								
Continue to create materials for the CCFESD to use and share to help grow the overall brand awareness across our diocese.	Create branded materials to help grow the brand awareness of the CCFESD within the diocese.	Kevin	Pens, pins, pop sockets, water bottels for the Reigion VIII, and all event give away items.	By 2020, we will have an array of items we will share with peoples in our diocese, including pens, pins, pop-sockets, coffee mugs, and notepads.			By 2023 we will have grown the items we use to share our brand to include placemats to be given to parishes for use at funerals, and other branded materials we develop.	
GOAL: GROW THE MARKETING DEPARTMENT								
HIRE A NEW STAFF MEMBER								
Hire a designer to focus on our community offices, planned giving campaigns, and the CCFESD Brand. The communications team upstairs will still design materials for events.	Until we have a full budget for this new team member, we will continue to hire a summer intern with a focus on design.	Kevin, Twila, Mark	Internship program established, and one intern has been through the process.	By 2020 hire another intern to help with design.			By 2023, hire a FT marketing staff member who will be the designer for the CCFESD.	