

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: President - Mark Conzemius

GOAL: Lead a thriving Catholic community foundation that provides ministry to donors in eastern SD and resources to parishes, schools, ministries and other charities in our region and beyond.

SMART GOALS: Specific, Measureable, Attainable, Relevant, Time Bound

STRATEGY:	ACTIVITIES:	COST:	WHO:	BASELINE TODAY (2022):	TARGET GOAL 1-YR (2023):	ACTUAL 1-YR (2023):	TARGET GOAL 2-YR (2024):	ACTUAL 2-YR (2024):	TARGET GOAL 3-YR (2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Support the Gift Planning Officers and grow the relationships and in impact of CCFESD community partnerships										
	Support Dave and the Aberdeen Catholic Foundation ED/GPO and deanery - pastors, board members and key constituents	Time	Mark, Dave	Initial implementation of the "One Vine, Many Branches" vision	Support Dave in the successful public launch of "One Vine, Many Branches" 6/5/22. Launch parish campaigns. Support Dave in securing ten leadership gifts (~\$10M)					
	Support Nicole and the Mitchell Catholic Foundation ED/GPO and deanery - pastors, former MFCE board and key constituents	Time	Mark, Nicole	MFCE fully transitioned to the MCF	Support Nicole in securing six charitable estate gifts for both parishes & JPII School - and for deanery parishes (~\$6M)					
	Support Marne and the Watertown and Brookings GPO, the Catholic communities and deanery - pastors, IC School Foundation and key constituents	Time	Mark, Marne	Initial two phases of IC School Teachers Endowment reached. Beginning connection with Brookings lay leaders	Support Marne in securing nine charitable estate gifts for Watertown & deanery parishes, schools & SDSU Newman Ctr (~\$9M)					
	Support Dave and the Pierre Catholic Foundation ED/GPO and deanery - pastors, St Joseph's School and key constituents	Time	Mark, Dave	No staff assigned for past year. Begin coverage by Dave Vetch, ED of ACF	Support Dave in securing three charitable estate gifts for St Peter parish, St Joseph school (~\$3M)					
	Support Ashley and the Yankton GPO, the Catholic community and deanery - pastors, Yankton Catholic Community Foundation and key constituents	Time	Mark, Ashley	Partnership with Mt Marty is strong.	Support Ashley in securing six charitable estate gifts for Yankton & deanery parishes, schools USD Newman Ctr (~\$6M)					
	Support Joe and the Sioux Falls Gift Planning Officer and the pastors/parishioners served		Mark, Joe	Initial phase of IHM Campaign. Public phase of Catheral InSpires Campaign	Support Joe in successfully launching the IHM Campaign and concluding the Cathedral InSpires Campaign - securing six charitable estate gifts (~\$6M)					
	Director of Gift Planning responsibilities		Mark	Interim Dir. of GP: Weekly check-ns, Monthly strategic planning sessions, Add'l meetings as needed	Hire an experienced FT Dir of Gift Planning					

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	Respond to invitations to support communities when invited, including west river SD	Time	Mark		Respond in timely manner with helpful communication and information - promoting collaboration and partnership in ministry					
Strengthen the relationship between the CCFESD and the Bishop of the Diocese of Sioux Falls										
	Support Bishop DeGroot as he implements his vision for the Diocese of Sioux Falls	Time	Mark		Promote and integrate "Lifelong Catholic Missionary Discipleship Through God's Love" in all that the CCFESD does.					
	Fulfill responsibilities as a member of the Bishop's Leadership Team	Time	Mark	Also joined the leadership team	Participate in weekly BLT meetings and related Ad Hoc meetings as needed.					
	Facilitate regular relationship cultivation meals and small group gatherings	Time	Mark	Approx. 2-4/month	Ave. one/week					
	Introduce Bishop DeGroot to lay leaders throughout the Diocese	Time	Mark		Intentionally schedule visits for Bishop with lay leaders (~ two small group or individual meeting/month)					
Prepare for anticipated CCFESD staff leadership transitions										
	Mark/President transition in 1.5 years	Time	Mark	Restructured & hired a COO	Prepare and mentor leaders within the CCFESD staff. Spread the word nationally of leadership opportunity					
	Jan & Peggy/Special Events retirement in next 5 years	Time	Mark	Nothing	Identify and prepare a transition plan					
	Kelly/Gift Planning Specialist retirement by end of FY22	Time	Mark	Hiring Heather Fortin to begin April 2022	Heather integrated successfully into the staff team					
	Barb/Data Base & Office Manager retirement in next 2-5 years	Time	Mark	Nothing	Identify and prepare a transition plan					
	Mike retirement in next 2-5 years	Time	Mark	Nothing	Identify and prepare a transition plan					
	Hire and Train the Dir of Gift Planning	Time	Mark	Identified and in process of hiring national recruiting company	Director of GP full integrated into the CCFESD team					
Develop and lead a high functioning staff that manages the effective growth of the CCFESD and transition of its leadership										
	Move support services, as appropriate, from outside to in-house management		Mark, Mike	CFO, accounting successfully transitioned into CCFESD team	Identify and prepare a transition plan as appropriate (Accts Payable, IT, HR)					

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	Hire Director of Gift Planning/Development - Responsible as Interim Director until FT Director is hired	TBD	Mark, Tony, Dave	Identified and in process of hiring national recruiting company	Dir. of Gift Planning fully integrated into the CCFESD leadership team					
	Ongoing assessment of office space needs		Mark, Tony	Conversations with Chancery leadership suggests there is no more room for CCFESD expansion	Each staff member has the tools and office space necessary to be successful with their responsibilities					
	Implement the independent TAFT compliance audit, as determined by the Governance Committee	\$10,000	Mark, Cameo	Initial report received. Key points identified.	All recommendations are implemented.					
	Support the COO's review, updating and development of efficient procedures and protocols		Tony	Hired COO to have this primary responsibility	Staff are operating with efficiencies and satisfaction					
	Lead the CCFESD management team		Mark	n/a	Mngt Team communicates and leads effectively					
	Develop a high performing team based on a culture of collaboration and trust		Mark, Tony, Mngt Team	Intentional training, including outside consultants as appropriate	Staff are mission driven and satisfied with their work, with clarity of roles, responsibilities and responsibilities, in an environment of trust					
Develop and lead a highly effective CCFESD Board of Directors										
	Each Board Member visited personally by GPO or President at least once a year	Time	Mark, Cameo, Joe, Dave, Marne, Nicole, Ashley	Began implementation with GPOs	Board members are informed and integrated into the work of the CCFESD					
	Effective board orientation for new members	Time	Mark, GPO	Currently a one meeting orientation	New board members integrate effectively into the CCFESD					
	Produce effective meetings	Time	Mark, Tony, Patty	Always a quorum. Anecdotal feedback to date.	Board members attend and participate in meetings. The work of the CCFESD is accomplished with clarity of direction					
	Effective board structure and operation	Time	Mark, Mngt Team	Currently eight committees, with two board meetings annually	Add a Prayer Committee as the ninth committee					
	Provide comprehensive, user friendly information monthly, semi-annually and as requested	Time	Mark, Team	Highlight info in regular board emails every 1-2 months	Board members are informed and understand the work of the CCFESD					

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	Support the board in identifying and implementing aspirational strategic initiatives	Time	Mark	Individual basis as initiated by board member	Individual board members partner with the CCFESD to achieve their philanthropic objectives					

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: COO - Tony Menke

GOAL: Support, Equip, and Train the staff of CCFESD

SMART GOALS: Specific, Measurable, Attainable, Relevant, Time Bound

STRATEGY:	ACTIVITIES:	COST:	WHO:	BASELINE TODAY (2022):	TARGET GOAL 1-YR (2023):	ACTUAL 1-YR (2023):	TARGET GOAL 2-YR (2024):	ACTUAL 2-YR (2024):	TARGET GOAL 3-YR (2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Support the staff of the CCFESD										
	Fill our staff openings with the right people	Time	Tony, Director of department	We have 17/20 positions filled	Fully Staffed					
	Create opportunities to strengthen unity among departments	Time	Tony, All staff	There are a few opportunities	Staff survey shows unity as a strength of CCFESD					
	Create opportunities for feedback/ideas	Time	Tony, Leadership Team	I believe this has started of good	Considered a strength of my position					
	Understand the roles that each team member plays	Time	Tony	5%	70%					
	Effectively onboard new employees	Time	Tony, Director of department	NA	New employees felt well prepared for their role					
	Prioritize the culture of the CCFESD by being intentional with implementing good practices	Time	Tony	NA	Staff feels that CCFESD is intentional about instilling a healthy culture					
Equip the team with the right tools for success										
	Look at other options with our database to decide if we are using the right one	Time	Tony, Barb, Ana	NA	Have confidence in the database we use being the best option					
	Look into how we store data and find efficiencies within it	Time	Tony, IT	Lots of data that isn't well organized	Have a process for naming and guidelines for what we store					
	Get our processes and procedures written down and updated	Time	Tony, All Staff	Have some written down	All are written down and a process in place for how we keep them updated					
	Look for efficiencies within our processes and procedures	Time	Tony, All Staff, IT	NA	Address our top 3-5 pain points					
	Assist Events in looking for better systems to use	Time	Tony, Events	Has already looked at different systems	Confidence in the system we use being the best					
Training and Education										
	Create/strengthen the training of new employees	Time	Tony, appropriate staff	Some/Little depending on position	Clear and defined training structures					
	Provide opportunities for further education and prioritize it for the staff	Time/Money	Tony, Leadership Team	Some opportunities	Staff believes it is a priority and are looking for new opportunities					

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Estate Planning/Legal

GOAL: Update and Improve Estate Planning Strategy AND Create lots of Forms/ help create, organize, and clarify policies and procedures

STRATEGY:	ACTIVITIES:	WHO:	BASELINE Today 2022:	TARGET GOAL 1-YR:	ACTUAL 1-YR (2023):	TARGET GOAL 2-YR:	ACTUAL 2-YR (2024):	TARGET GOAL 3-YR (2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Manage and support GPOs re estate planning									
	Review and revise Estate Planning Strategy based on updated law and best practice	Cameo/GPOs							
	Provide monthly training on topics of interest and applicability	Cameo	2	12					
	review and revise tools for use in conversation with donors	Cameo/GPOs	leaving a legacy p. 58 of EOL						
	Review and revise EOL seminars and Guide	Cameo/GPOs							-
	Meeting with donors and GPO to help weave charitable piece into estate plan	Cameo/GPOs	3%	75%					
	Attend monthly strategy sessions	Cameo/GPOs							
Present End of Life Seminars									
	Revise and update EOL guide and POA	Cameo/GPO		POA in attorney office in every community		POA in 3 offices in every community		have POA in every estate planning atty office every parish	
	schedule EOL seminar	Cameo/GPO			3	10			
	Follow up visits	Cameo/GPO							
	coordinate w gpo to reach out to Pastors to connect with their parish for EOL seminar	Cameo/GPO	2 (Nicole and Marne)						
	retool Leaving a Legacy brochure to be useful here	Cameo/GPO							
Compliance and Ethics Program/ Fiduciary Duty									
	TAFt legal review-follow up with implementing recommendations	Cameo/governance committee		implement					
	develop visible compliance program and culture of ethics	Cameo/mngmnt team		implement		training and awareness		automatic mindset to do what Nicole does naturally	
	ask-what is best practice v. what's the risk ethical culture (solidarity, subsidiarity, Mission, core values, conflict of interest)								
Facilitate the Governance Committee									
	Coordinate compliance audit	Cameo/ lots of help	First audit completed	Data base security audit?					

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	Make recommendations to the board for changes to foundation policies	Cameo	work with governance committee to put list together for Spring Board Meeting						
	implement Taft recommendations	Cameo							
estate planning donors									
	Manage a portfolio of 30 donors								
	OR- be estate planning support for every GPO	Cameo/GPO	Marne						
	Reach out to estate planning lawyers	Cameo		in every community		in every office			
	Bring charitable planning visibility to SD BAR			Law for Lunch education					
Oversee the legal pieces of CCF									
	policy and procedures around organizational structure	specific members of the team		Gift Processing, estate planning, Campaign, confidentiality, Digital Assets					
Future full of Hope:									
	for our diocese, our community, our parish, for our loved ones, for ourselves	team	?						
	implement into estate plan	Cameo							
adoration sisters									
		la persona con quien ellas hablan cuando tienen preguntas y quieren informacion							

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:	COST:	WHO:	BASELINE TODAY (2022):	TARGET GOAL 1-YR (2023):	ACTUAL 1-YR (2023):	TARGET GOAL 2-YR (2024):	ACTUAL 2-YR (2024):	TARGET GOAL 3-YR (2025):	SUCCESS/COMMENT/STATUS: "- Behind, "0" On Schedule, "+" Ahead
Transition duties to Heather Fortin by May 1, 2022										
	CTFA Certification	\$249/yr	Kelly	Kelly currently certified	Heather was previously certified, but will need to test in order to renew certification					
	Web-based subscription to National Business Institute to attain 45 credits in each 3 yr cycle	\$1,299/yr	Kelly	Subscription not renewed in 2022						
	Notify Priests of transition									
	Notify Donors & Bd Members of transition		Kelly/Mark							
Stay current in all areas of certification/education										
	Maintain CTFA Certification	\$249/yr	Kelly	Currently certified						
	Web-based subscription to National Business Institute to attain 45 credits in each 3 yr cycle	\$1,299/yr	Kelly	Not renewed						
Maintenance/Tracking of Outstanding Estates										
	Maintain spreadsheet/tracking of donors with estate pledges		Kelly	Kelly	Transition to Heather					
	Track Deceased donors with Pledge Balances and complete necessary follow-up		Kelly/Barb	Kelly/Barb	Transition to Heather & Barb					
	Maintain tracking of donors for whom CCFESD is Personal Representative		Kelly	Kelly/Barb	Transition to Heather & Barb					
Trusts/Annuities/Tax Returns										
	Calculate and monitor annual quarterly trust distribution amounts		Kelly/Barb	Preparing for 1st quarter 2022 distributions	(Heather) Continue working on annual calculations w/Mary Dally at Payscale Acctg					
	Preparation/transmittal/signing/ mailing of Trust Tax Returns		Kelly/Barb	Barb/Kelly working with Mary Dally on 2021 returns	(Heather) Continue working on annual tax returns w/Mary Dally at Payscale Acctg					
Facilitate Farm Commodity Gifts										
	Meet with grain elevators to establish accounts w/CCFESD	Time	Kelly	25 Elevators						
	Determine current/possible commodity donors (farmers)		Kelly/Barb	Attribute established: Foundation/Agriculture/ Farmer	Heather					

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:	COST:	WHO:	BASELINE TODAY (2022):	TARGET GOAL 1-YR (2023):	ACTUAL 1-YR (2023):	TARGET GOAL 2-YR (2024):	ACTUAL 2-YR (2024):	TARGET GOAL 3-YR (2025):	SUCCESS/COMMENT/STATUS: "- Behind, "0" On Schedule, "+" Ahead
	Educate donors on commodity gifting opportunity by mail and/or social media		Kelly/GPO's	Identify who is driver of this process	GPO's					
	Transition these donors to appropriate gift planners for gift development		Kelly/PG Officers	Identify who is driver of this process	Heather/GPO's					
Back Office for Gifts of Stock/IRA's										
	Gifts of Stock		Kelly/ Barb/ Michelle	FY2022 thus far = 70 non-cash gifts totalling \$1,222,909	Heather					
	Non-Cash Gifts		Kelly/Barb	Transitioned to NON-CASH designation rather than just "stock"	Heather					
	Update broker master schedule and broker agreements		Kelly	Not completed	Heather					
	IRA Gifts		Kelly/ Barb/ Michelle	FY2022 thus far = 79 IRA gifts totalling \$462,833	Heather					
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	Weekly Thursday appt w/Dave works very well for me. Others call as needed	Heather					
	Provide Agreements for Trusts, Endowments, Agency Accounts, Annuities. Prompt turnaround for requested assistance/documents		Kelly	Sometimes difficult to accomplish in requested timeframe						
Inter-Office Relationships										
	Maintain close working relationship with Finance Department		All	I so appreciate having MJ close by for advice and discussion						
	Be a "Rules & Regs" resource as much as possible		Kelly/Mike/ Outsource	I so appreciate having Cameo in office for advice and discussion	Transition to Heather					
Clean Annual Independent Audit										
	Maintain file content to ensure Auditors receive accurate information		Kelly/Barb/ Mike	Kelly/Barb/ Mike	Transition to Heather					
	Ensure proper/current IRS forms are used when needed		Kelly/Barb/ Mike	Cameo/Kelly/Barb/Mike	Transition to Heather					
	Review files for content/accuracy		Assist Barb with this process	Assist Barb with this process	Transition to Heather					

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GOAL: Assist Gift Planning Team in Furthering the Mission of CCFESD										
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Establish Transition plan for Sept. 2022 Retirement										
	Determine need, and if needed, determine training requirements		Kelly/Andrew/Mark	May 2022!						

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

Specific, Measurable, Actionable, Realistic, Time Bound

STRATEGY:	ACTIVITIES:	COST:	BASELINE 2021 (March):	TARGET GOAL 1-YR (2022):	ACTUAL 1-YR (2022):	TARGET GOAL 2-YR (2023):	ACTUAL 2-YR (2023):	TARGET GOAL 3-YR (2024):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
	set up appointments to deliver distribution checks/EFT and/or EOL Planning Guide for Catholics		I have not done any of this yet, I plan on talking to Marne about this.						
	offer to meet with parish/finance councils		Met with Miller's finance council in Feb, went well.						
	offer to host end of life planning seminars in their parishes		Have offered to do so in Pierre and Miller so far, will continue to move forward doing so.	Will try to do one in each parish by end of year.					
	start w/ priest & councils		Need to meet with more priests	Would like to meet all priests in deanery by the end of the year.					
Improve overall perception of PCF/CCFESD - Create trust with donors									
	Educate general public on our mission & vision		Doing so in how I call people and present myself in public.	Would like for more people to be aware of the foundation.					
	Brand marketing		Need to get some dress shirts with the logo on, could work on getting some in the community.						
	Distribute a newsletter in the Pierre community bi-annually		Havent done this yet, need to contact our board when this would be released.						
	Continue to be involved in the life of my local parishes and community		Doing my best to continue this.						
	Live the life I'm promoting - be authentic - gain trust through actions		Doing my best to continue this.						
Personally connect with CFSA major gift donors									
	Coordinate parishioner contact with their pastors		Have been working with Fr. Joe and Paul on this, been getting names and advice from them.						
	Call, email, write donors to thank them for their gifts		Have been doing this.	Would like to do this for all the people that have donated during the year.					
	Update CFSA donor list (finding out their interests)		Unsure how to do this, will talk to Marne about this.						
Use the End of Life Planning Guide to meet with (2-3)? contacts per month									
	Secure CCFESD Board Members as host couples for "End of Life Planning for Catholics"		?						
	Share EOL Guide with Pastors/Parish		Will do more of						
	Share EOL Guide with Professionals		Have met with an attorney in Pierre as well as Miller						
	Share EOL Guide with current donors		Working on getting to this stage with donors.						
	Produce EOL seminars in parishes in my deanery		In the process						
	Follow up with EOL attendees to go through book together		Working through this process with the people Maggie had attend her EOL						
	Query list of 70+ donors & identify prospective visits with their pastor		Have done so, will continue to do so.	Hope to have a more complete list by years end.					
Connect with existing donors in Pierre Deanery									
	Work with Pastors to identify and strategize about contact with their parishioners/donors		Have been doing so in Pierre and Miller, will expand this and contact the rest of the the prists in my deanery.						
	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		Working on this process.	Would like to have met with all major gift donors by years end.					
	Coordinate with Special Events to identify donors to invite and host at each event		Need more information here.						
	Set up actions daily in RE NEXT		Have been doing so.	Would like to have a much larger basis of actions.					
	Have meaningful contacts with local parishioners with/on behalf of pastors to build trusting relationships		Have been doing so.						
	Have follow up conversations (with Bette/Mark and board members) as appropriate		Have been and will continue to do so, more than just my monthly strategy meeting.						
	Current amount in the SJS Endowment		\$165,622.59	Unsure on goal for this, will talk to Fr. Joe about what his goals are for this number					
	Current amount in Pierre Cemetary		\$80,139.83						
	Current amount in the St. Peter and Paul Parish		(will find out)						

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Sioux Falls Deanery - Joe

GOAL: Raise, Manage, and Distribute God's Gifts through campaigns & charitable estate gifts to bring all involved closer to Christ and the Church in the SF

STRATEGY:	ACTIVITIES:	TARGET GOAL (July 2021-June 2022):	ACTUAL (July 2021-June 2022):	TARGET GOAL 1-YR (July 2022 - June 2023):	ACTUAL 1 YR	TARGET GOAL 2-YR (July 2023 - June 2024):	ACTUAL 2 YR	TARGET GOAL 3-YR (July 2024 - June 2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Personal									
	Role play before major gift visits			1/ every other wk or 25		1/ every other wk or 25			
	Grow in my use of tone and body language								
Culture									
	Affirm and connect with colleagues			3/ wk 147		These will become habits and will be replaced			
Work									
	Plan next day before completing work to be present when entering family life		90	90		These will become habits and will be replaced			
	Track time according to Campaigns and Charitable Gift Planning					Make strategic decisions given baseline			
Invite Gifts									
	Baseline Meetings	245	219			245		245	
	Implement next phase of Cathedral Restoration (Rectory/Organ/Liturgical Music End)		\$5.5M	\$3.5M		Fulfill Pledges for 9M		Fulfill Pledges for 9M	
	Visit with low/midrange capacity at Cathedral	98	74	98 or 2/wk					
	Direct mail for Cathedral			\$500k		Fulfill Pledges		Fulfill Pledges	
	Execute small gatherings and Cathedral	5	4	3					
	Participation Percentage at Cathedral			25%				25%	
	Implement St. Mary's CC		\$600k	\$6M		\$3M			
	Visit with potential substantial donors to St. Mary's Campaign		94	245 or 5/wk					
	Execute small gatherings for St. Mary's		4	4		3		1	
	Secure Estate Pledges through St. Mary's			\$10M		\$10M		\$24M	
	Participation Percentage for St. Mary's			40%					
	Secure non campaign Estate Gifts/Yr		1	1		1		6	
Create Capital Campaign Playbook									
	Discernment re when to work with a parish or not now		underway			should be complete			
	Detailed Timeline for phases, events, mailings		underway			should be complete			
	Detailed Contract for services		underway			should be complete			
	Marketing/Communications w/ campaigns		underway			should be complete			
	Policies & Procedures for Campaigns		underway			should be complete			
	Best Practices around RENXT for campaigns		underway			should be complete			
	Finalize Volunteer Committees & Continue to refine		Complete			should be complete			
Steward Existing Donors									
	Set up appointments to deliver distribution checks/EFT and/or EOL Planning Guide for Catholics		12	15		15		15	
Discovery									
	Thank donors with a Call or e-mail (>250)	40	40	200 or 1/day		200		200	
	Research based on Board, HH, Previous Giving, Capacity, Age, Estate Plan, Affinity	10	10						

	Test top 50 Prospects through prospect research at St. Mary's	50		Find 5 unknown prospects				
	Present at Deanery Pastor Events to share what's working	once a quarter	1/yr	1/yr		1/yr		1/yr
Cultivate								
	Cultivate 10 non Campaign Prospects 2 visits/mo. All contact types except meetings, Dilneate by Phone Calls, Mail, Text, etc.		985	24 Visits/yr		36/yr		36/yr
	Identify and Moves Management for people from Campaigns to Future Gifts							

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 and planned gifts for the ministries of the Mitchell Catholic Community & Parishes in the Mitchell Deanery & Diocese

Specific, Measurable, Attainable, Relevant, Time Bound

STRATEGY:	ACTIVITIES:	BASELINE TODAY (Fiscal Year: July 1, 2021- June 30, 2022):	TARGET GOAL 1-YR (Fiscal Year July 1, 2022 - June 30, 2023):	ACTUAL 1-YR (Fiscal Year July 1, 2022 - June 30, 2023):	TARGET GOAL 2-YR (Fiscal Year July 1, 2023- June 30, 2024):	ACTUAL 2-YR (Fiscal Year July 1, 2023- June 30, 2024):	TARGET GOAL 3-YR (Fiscal Year July 1, 2024 - June 30, 2025):	ACTUAL 3-YR (Fiscal Year July 1, 2024 - June 30, 2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Discovery	Future prospects to cultivate								
	Identify 20 Initial Prospects for further Research (Min of 20)	44	20						
	Complete an action to connect with discovery donors at least once a week or as occasions occur naturally. Thank you calls/letters for donations of \$1,000 or more Call/Send thank you for CFSA significant gifts \$1,000+, birthday cards, anniv cards, daily Mass, coffee, ect...	27	52						focus more on cultivation and invitation until I need to funnel more into those categories - actually do more of thes than I realize- just dont get them all entered. Easter cards, christmas cards, etc... visits at Mass and parish events
	Monthly meetings with Mark/Rick/Bette to discuss potential donors	12	12						
	Move Prospects from Discovery into Cultivation	0	10						
	Be present at local parish and deanery events to determine who to cultivate	12	12						
	Be present at Deanery/Diocesan events to determine who to cultivate	4	4						bishop events, C@C, GOH, Fish, Taste
Cultivation	Donors to cultivate relationships with								
	Identify Prospects who through Discovery that I have determined need additional relationship cultivation (Min of 20)	36	20						
	1 Face to face meetings each month with cultivation donors to build relationship & trust	5 x 12 = 60	8 x 12 = 96						
	Complete an action to connect with Cultivation donors once a month or as occasions occur. (Thank you calls/letters for donations of \$1,000 or more Call/Send thank you for CFSA significant gifts \$1,000+, birthday cards, anniv cards, daily Mass, coffee, etc...)	15 x 12 = 188	10 x 12 = 120						
	Help pastors create parish "Future Full of Hope" plans using their wish lists and current budgets	1	3						Mitchell, beg stages of Huron
	Set up appointments to deliver distribution checks/EFT to parishes,schools	10	13						
	Offer to host end of life planning seminars in each parish	1	3						
	Have touch point events with local parishioners with/on behalf of pastors to build trusting relationships	4	6						
	Monthly meetings with Mark/Rick/Bette to discuss potential donors	12	12						
Invitation	Donors who we have determined are ready for "the ask"								
	Identify Prospects, who through Cultivation, I have determined are ready to consider an estate gift	19	20						
	Establish charitable estate plans with all CCFESD Board Members (& Board Emeritus) who live in Mitchell Deanery	1	3						
	Secure estate gifts	3 = \$2,454,857	6 = \$4.8						
	1 Face to face meetings each month with invitation donors to build relationship & trust	18 x 12 = 216	20 x 12 =240						
	Complete an action to connect with invitation donors at least twice times a month: Thank you calls/letters for donations of \$1,000 or more Call/Send thank you for CFSA significant gifts \$1,000+, birthday cards, anniv cards, daily Mass, coffee, ect...	20 x 12 = 240	20 x 12 = 240						
	Monthly meetings with Mark/Rick/Bette to discuss potential donors	12	12						

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 and planned gifts for the ministries of the Mitchell Catholic Community & Parishes in the Mitchell Deanery & Diocese									
Specific, Measurable, Attainable, Relevant, Time Bound									
STRATEGY:	ACTIVITIES:	BASELINE TODAY (Fiscal Year: July 1, 2021- June 30, 2022):	TARGET GOAL 1-YR (Fiscal Year July 1, 2022 - June 30, 2023):	ACTUAL 1-YR (Fiscal Year July 1, 2022 - June 30, 2023):	TARGET GOAL 2-YR (Fiscal Year July 1, 2023- June 30, 2024):	ACTUAL 2-YR (Fiscal Year July 1, 2023- June 30, 2024):	TARGET GOAL 3-YR (Fiscal Year July 1, 2024 - June 30, 2025):	ACTUAL 3-YR (Fiscal Year July 1, 2024 - June 30, 2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Stewardship	Donors who have established estate gifts								
	One meaningful touch each quarter (4/yr) with existing major gift donors/year (birthday cards, Easter cards, Christmas cards, Legacy Society, events)	10 x 4 = 40	16 x 4 = 64						
	Partners (Priests, Board Members, Attorneys, Financial Planners, Schools, Parishes, Organizations, etc.)								0
	Introduce the Foundation to new potential partners								
	Share EOL Guide with Pastors/Parish	2	6						
	Share EOL Guide with Professionals	2	4						
	Share EOL Guide with current donors	2	6						
	Endowed Funds for the Mitchell Catholic Foundation - Creating A Future Full of Hope								
	Holy Family Parish	\$251,325.90	\$500,000.00						
	Holy Spirit Parish	\$201,250.00	\$400,000.00						
	John Paul II School	\$2,560,094.57	\$3,500,000.00	-	-				
	Faith Formation	\$182,791.97	\$200,000.00						
	Cemetery	\$575,530.83	\$580,000.00						already fully funded for current needs
	Establish a successful Marketing Timeline and Plan for the Gift Planning Team								
	Communicate needs with gift planning team at weekly road warrior mtg								
	Create articles on planned giving opportunities/stories for monthly newsletter								
	Collaborate with Jan on PG marketing projects								
	Continue to create weekly bulletin notes for PG team								
	Develop a Plan of Action to Build Teacher Salary Endowment for JP II								includes individual endowments established by donors
	Work with Pastor, School Principal, Business Manager & Dev Director to have a shared mission @ Teacher Salary Endowment (similar to IC School/Watertown)								a recent win was convincing the school to bring in a professional to help with strategic planning
	Get list of top contributors & families who pay tuition in full from school								
	Improve overall perception of MCF/CCFESD - Create trust with donors								Very important!
	Educate general public on our mission & vision								weekly bulletin notes promoting a culture of stewardship, promoting the joy of giving & our mission at a local parish level- including deanery list in bulletin announcements
	Brand marketing								Social media marketing regularly. Weekly parish bulletin announcement.
	Continue to be involved in the life of my local parishes and community								Being careful not to overextend my responsibilities in the parish beyond the job I was hired for.

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 and planned gifts for the ministries of the Mitchell Catholic Community & Parishes in the Mitchell Deanery & Diocese

Specific, Measurable, Attainable, Relevant, Time Bound

STRATEGY:	ACTIVITIES:	BASELINE TODAY (Fiscal Year: July 1, 2021- June 30, 2022):	TARGET GOAL 1-YR (Fiscal Year July 1, 2022 - June 30, 2023):	ACTUAL 1-YR (Fiscal Year July 1, 2022 - June 30, 2023):	TARGET GOAL 2-YR (Fiscal Year July 1, 2023- June 30, 2024):	ACTUAL 2-YR (Fiscal Year July 1, 2023- June 30, 2024):	TARGET GOAL 3-YR (Fiscal Year July 1, 2024 - June 30, 2025):	ACTUAL 3-YR (Fiscal Year July 1, 2024 - June 30, 2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
	Live the life I'm promoting - be authentic - gain trust through actions								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								How do we better manage our time 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?
	Call, email, write donors to thank them for their gifts			6					
	Update CFSA donor list								
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"								
	Share EOL Guide with Pastors/Parish								
	Share EOL Guide with Professionals			2					
	Share EOL Guide with current donors								
	Produce EOL seminars in parishes in my deanery	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				12		24		
	Query list of 70+ donors & identify prospective visits with their pastor								
Connect with existing donors in Mitchell Deanery									
	Work with Pastors to identify and strategize about contact with their parishioners/donors								learning how to track this in RE
	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								
	Coordinate with Special Events to identify donors to invite and host at each event			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								
	Personally dictate into RE app Notes Tab								
	Set up actions daily in RE NEXT					261	261		Getting much better at using RE NEXT each weekday of the year
	Have touch point events with local parishioners with/on behalf of pastors to build trusting relationships			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									
	Have follow up conversations (with Bette/Mark and board members) as appropriate					20	20		
Continue Mitchell Catholic Foundation Annual Appeal									

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Watertown/Brookings Deanery Areas- Marne Hult

GOAL: Further the mission of the CCFESD to establish endowments and planned gifts for the ministries of the Parishes in the Watertown Deanery & Diocese

Specific, Measurable, Attainable, Relevant, Time Bound

STRATEGY:	ACTIVITIES:	BASELINE TODAY (Fiscal Year July 1, 2021- June 30, 2022):	TARGET GOAL 1-YR (Fiscal Year July 1, 2022 - June 30, 2023):	ACTUAL 1-YR (Fiscal Year July 1, 2022 - June 30, 2023):	TARGET GOAL 2-YR (Fiscal Year July 1, 2023- June 30, 2024):	ACTUAL 2-YR (Fiscal Year July 1, 2023- June 30, 2024):	TARGET GOAL 3-YR (Fiscal Year July 1, 2024 - June 30, 2025):	ACTUAL 3-YR (Fiscal Year July 1, 2024 - June 30, 2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Discovery	Future prospects to cultivate (20-30)								
	Identify Initial Prospects for further Research (Min of 20)	35	20						
	Complete an action to connect with Discovery donors once a week or as occasions occur. (Thank you calls/letters for donations of \$1,000 or more. Call/Send thank you for CFSA significant gifts \$1,000+, birthday cards, anniv cards, daily Mass, coffee, etc....)	25	52						
	Monthly meetings with Mark/Rick/Bette/Cameo to discuss potential donors	12	12						
	Move Prospects from Discovery into Cultivation	5	10						
	Be present at Local Parish, Deanery and Diocesan events to meet other potential donors to add to Discovery	5	10						
Cultivation	Donors to cultivate relationships with (20-30)								
	Identify Prospects who through Discovery that I have determined need additional relationship cultivation (Min of 20)	53	20						
	Face to face meetings each month with Cultivation donors to build relationship & trust	15	15			-			
	Complete an action to connect with Cultivation donors once a month or as occasions occur. (Thank you calls/letters for donations of \$1,000 or more Call/Send thank you for CFSA significant gifts \$1,000+, birthday cards, anniv cards, daily Mass, coffee, etc...)	30	30			-			
	Help pastors create parish "Future Full of Hope" plans using their wish lists and current budgets	2	4						
	Set up appointments to deliver distribution checks/EFT to parishes, schools	24	24						
	Offer to host End of Life planning seminars in each parish	0	4						

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS									
PRIORITY AREA: Gift Planning, Watertown/Brookings Deanery Areas- Marne Hult									
GOAL: Further the mission of the CCFESD to establish endowments and planned gifts for the ministries of the Parishes in the Watertown Deanery & Diocese									
Specific, Measurable, Attainable, Relevant, Time Bound									
STRATEGY:	ACTIVITIES:	BASELINE TODAY (Fiscal Year July 1, 2021- June 30, 2022):	TARGET GOAL 1-YR (Fiscal Year July 1, 2022 - June 30, 2023):	ACTUAL 1-YR (Fiscal Year July 1, 2022 - June 30, 2023):	TARGET GOAL 2-YR (Fiscal Year July 1, 2023- June 30, 2024):	ACTUAL 2-YR (Fiscal Year July 1, 2023- June 30, 2024):	TARGET GOAL 3-YR (Fiscal Year July 1, 2024 - June 30, 2025):	ACTUAL 3-YR (Fiscal Year July 1, 2024 - June 30, 2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Invitation	Donors who we have determined are ready for "the ask" (20-30)								
	Identify Prospects, who through Cultivation, I have determined are ready to consider an estate gift (Min of 20)	34	20						
	Weekly contact to donors in Invitation. (by call, text, mail, email or in person visits)	21 x 12 = 252	21 x 12 = 252						
	Secure estate gifts	4 = \$4,583,425	9 = \$5M		18 = \$10M	-	27 = \$15M		
Stewardship	Donors who have established estate gifts								
	One meaningful touch each quarter (4/yr) with existing major gift donors/year (birthday cards, Easter cards, Christmas cards, Legacy Society, events)	27	47						
Partners	Those who help us further relationships with donors: Priests, Board Members, Attorneys, Financial Planners, Schools, Parishes, Organizations, etc.								
	Introduce the Foundation to new potential partners								
	Share EOL Guide with Pastors/Parish	0	5						
	Share EOL Guide with Professionals	5	15						
	Share EOL Guide with current donors	10	15						
	offer to host end of life planning seminars in their parishes	5	5						
IC School Teachers Salary Endowment - Initial Goal of \$1.7M completed		\$1,734,665 Jan report	\$2,000,000		\$2,250,000		\$2,500,000		Completed- now to next goal level
	Secure planned gifts for IC School	\$3,718,090 Outstanding Planned Gifts							"+"
	Identifying strong donor/donors to be a 1-for-1 match for remaining \$765,335								
	Continue to ask parishioners to tour IC School and prayerfully make a gift to the IC School Teacher's Salary Endowment (2 prospects per month)	8	24		24		24		
	IC School Principal, Carol Dage is retiring at the end of the school year- May 2021. Continue working with Carol until new hire to identify individuals who have a connection to IC School for gifts.	Meet monthly with new principal	12 meetings or more		12 meetings or more		12 meetings or more		

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Yankton Area - Ashley Gullikson

GOAL: Establish planned gifts for the ministries of our diocese in the Yankton Deanery Region and Mount Marty University

STRATEGY:	WHO:	BASELINE (2022):	TARGET GOAL 1-YR (2023):	ACTUAL 1-YR (2023):	TARGET GOAL 2-YR (2024):	ACTUAL 2-YR (2024):	TARGET GOAL 3-YR (2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Discover future prospects (20 average)								
Facilitate EOL Seminars		1 seminar	3 seminars		3 seminars		9 seminars	
Call donors with significant gifts \$1,000+		0	10		10		30	
Cultivate new and existing donors for planned gifts (20 average)								
Weekly goal of calls/visits (5/week)- 20/mo		276	240		240		720	
Invite friends to prayerfully consider a charitable provision in their estate (20 average)								
			6=\$1,500,000		12=\$3,000,000		18=\$4,500,000	
Weekly goal of calls/visits (each person contact each week)		276	300		300		900	
Establish priest personal estate gift		0	1		1		3	
Establish board member estate gift		0	1		1		3	
Establish Endowments		0	3		3		9	
Secure estate gifts		0	2		2		6	
Steward planned gifts (20+)								
Meaningful touch each quarter (calls/visits/letters)		31	50		50		150	
Create partners in the Yankton Deanery (Priests, Board Members, Church Councils, Financial Planners, Attorneys, Catholic Schools' Administration)								
Set up individual yearly meetings to meet each priest/parish council to educate them on what the CCFESD can do to help each parish & deliver distribution documentation (11 priests)		10	11		11		11	
Meaningful contact with each priest quarterly (phone call, visit) (11 priests)		34	44		44		44	
Meet individually with current and past Board Members each quarter (8 couples-4/year)		16	20		20		32	
Meet with Professionals with Cameo (1 visit/call per month)		1-2	12		12		12	
Establish a greater presence for the Catholic Community Foundation in the Yankton area and with Mount Marty- improve perception and create trust								
Create clear communication/teamwork with the Yankton Catholic Community Foundation- reach out 2/month			24		24		24	
Mount Marty University Campaign (\$7.5M Planned Gifts over 5 years)								
		\$4.27	\$6M		\$7M		\$7.5M	

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Gift Planning, Aberdeen Area - Dave Vetch

GOAL: Implement Leadership Development and Leadership Gift activities of the "1 Vine, Many Branches" in the Aberdeen Catholic community

STRATEGY:	WHO:	BASELINE (2022):	TARGET GOAL 1-YR (2023):	ACTUAL 1-YR (2023):	TARGET GOAL 2-YR (2024):	ACTUAL 2-YR (2024):	TARGET GOAL 3-YR (2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Financial	Assets under management to ACF	\$9M	\$9.7M		\$10.3M		\$11 million	
	Planned gifts averaging \$250k (12)	\$12M	\$15M		\$17.5M		\$20 million	
Stewardship	Semi-Annual Touch							+
	Annual review in Aug/Sept	Dave	15	15	20		50	
	Invite each steward "to consider the Church like their children" in their estate plan	Dave	0	1			3	
Partner	Annual work with Priests/Parishes							
	Bi-monthly touch with each area priest	Dave	6	6			18	
	Intentional activities with Pierre Catholic Foundation			12	24		36	monthly session in Pierre/Fr. Joe Holzhauser
	Develop Future Full of Hope model	Dave	1	1			2	Hoven- St. Anthony Parish
	EOL session in parishes	Dave	3	4	8		12	Groton, Hoven, Aberdeen, Ipswich
	Offer Agency Accounts as a solution to parish councils	Dave	numerous	3	7		12	Onaka,
Discovery	Engagement activities to move into and through Discovery							-
	Activities measurable per month	Dave		15				
	EOL session in parishes	Dave		24@ 10 participants				
	Follow up conversations from EOL Session			20 participants				
Cultivation	Cultivation activities to move into and through Cultivation							-
	monthly cultivation activities			15				
Invitation	Invitation activities to move into and through Invitation							
	measurable monthly initiative actions			12				
	planned endowment- 1 vine leadership		2	2			6	
	planned endowment- ACF Board		1	2			6	
	major gift - 1vine leadership		1	2			6	
	major gift - ACF Board		0	2			6	
	Planned gift endowment - general population		24	8			24	
	Major gifts - general population		7	8			24	
Leadership	Manage "1Vine, Many Branches" initiative							
Re-Develop	Continue work with Pastor Andrew Dickinson and new parish councils structures with "yoking"	Dave/Fr. Dickinson						
Developed	Formalize vision and donor menu to point where it can be used with major gift donors	Dave						Maximize the opportunity from \$9M 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
On-going	Development of Leadership and Leadership Gifts	Dave/Priests/ACF Board						

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 "1 Vine, Many Branches" in the Aberdeen Catholic community

STRATEGY:		WHO:	BASELINE (2022):	TARGET GOAL 1-YR (2023):	ACTUAL 1-YR (2023):	TARGET GOAL 2-YR (2024):	ACTUAL 2-YR (2024):	TARGET GOAL 3-YR (2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Initiate	Develop strategy to invite 52 parish potential leadership roles and/or gifts	Dave				12			
	Planned gifts -			12 @\$250k		24@\$250k		36@\$250K	Slightly behind in securing estate pledges
	Major Gifts - 12 gifts			\$3M pledged	Goal met	\$9M Goal		\$9Million	Slightly behind in securing major gifts
Implement	St. Mary's Leadership Gift opportunity	Dave/Fr. Dickinson		\$3M Match Fund	\$1.5Million pledged	\$3M Endowment	\$200k pledged	\$3-3M total, inc inspirational gifts	On track for Future Full of Hope for Parish
Implement	Roncalli High School Fine Arts Renovation	Dave/Rick Kline		\$3M Match Fund	\$700K pledged	\$3M Endowment	\$500k pledged	\$3-3M total, inc insprational gifts	On track for Future Full of Hope for Parish

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 (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
GOAL: Improve Efficiencies, Awareness, Attendance, and Revenue at All Events									
Collaborate with Gift Planning Officers on all events to find opportunities for them to cultivate relationships with prospective as well as existing donors	1) Provide all event dates to GPO's; 2) As event registrations come in share attendee lists with the GPO's to help them know who is attending and from what Deanery, etc. 3) Align the GPO's with tasks at the event that would provide them with the best exposure to attendees.	Event Team / Gift Planning Officers Team	Providing attendee lists to GPO's prior to event. Discussing options of how they see themselves plugged in at any of the events.	1) Provide the designated GPO with a list of events that they could share with the GPO team at a Road Warrior meeting. 2) Share lists of attendees to all GPO's leading up to an event. 3) Discuss best methods for each event as to how to plug them in at the events (ie registration table, etc.)					
Collaborate with Gift Planning Officers on potential event sponsors/donors.	Work with GPO's to brainstorm on prospective event sponsors, donors, attendees from their respective areas.	Jan / Gift Planning Officers	No process in place at this time. Typically one-off discussions.	To develop a simple process where Jan could meet with GPO's approximately 3 months prior to an event to visit about prospective donors, sponsors, attendees and methods to invite them. This can include GPO's acting as escorts with attendees to the events (ie bus groups to C@C, driving guests to the Hunt, etc etc). Post event visit with GPO's on who, from the event, might be a great opportunity for moving up the pyramid.					
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 with each event and engage better efficiencies.	Event Team	Existing procedures and timelines exist.	Improved and documented streamlined processes - with input from all team members on what we can do better, smoother and more efficiently.					
Event Team conduct pre-event kick off strategy meeting	Event Team will continue to formally kick-off each event 3-6 months in advance of the event 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).	Event Team	Process in place whereas all event timelines are either moved or in the process of being moved to a Google sheet for ease of sharing. Team continues to do kick off meetings.	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.					

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 (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Maintenance of each event related Timeline and To-Do document	Documentation of all event tasks, deadlines, procedures and processes within the existing event Timeline and To-Do document. This includes updates and assignments.	Event Team	Existing timelines and checklists exist. Hold an event kick off meeting with the event team to review assignments, establish deadlines, etc. Periodic check-ins throughout the months leading up to an event.	Become more intentional and disciplined with this process. Update all documented processes and timelines throughout the individual event planning processes - and - hold a post event discussion (updating the document) before closing out the event.					
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.	Event Team Marketing	This continues to be a strong focus for the team. We remain very intentional. Strong focus has been placed on our marketing materials to ensure they clearly highlight the beneficiary.	Continue existing efforts to ensure that all committee members, donors and attendees are fully aware of the mission of each of our event beneficiaries. Seek opportunities for the Event Team, along with committee members and other key stakeholders to volunteer at, meet with, and/or tour the physical location of each beneficiary to heighten the passion for the works performed by these entities.					
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; Gift Planning staff present and mingling at events; etc.	All	Carefully and intentionally co-branding all event marketing materials with the beneficiary along with CCFESD logos. Using opportunities to promote in event programs to heighten awareness of CCFESD to event attendees. Use of logo wear at all events.	Continue to keep this top of mind with every event we produce. Use of Mark, Tony or any of our GPO's to speak at the events (when and where appropriate), sharing the vision and mission of CCFESD. Ensure that all attendees understand that CCFESD does more than just 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 (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Event specific Social Media promotion opportunities.	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.	Event Team Marketing	Calendar exists with event specific social media posts scheduled. This includes target content.	With the opportunity to work with a new marketing coordinator, develop a content strategy that will provide consistent & regular social media messaging throughout all events, in collaboration with the GPO's related messaging.					
Annual discussion regarding beneficiaries for the Bishop's Events. Assist beneficiaries to understand the value of investing in endowments versus operational funding.	Meet annually to discuss and review - prior to budget planning in February.	Mark Mike Jan	No disciplined process in place at this time.	Schedule 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). Ensure all decisions are documented and agreed upon in advance of beginning event planning and promotion.					
Keep the event(s) alive all year round. Ensure that each sponsor/donor/attende e 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	This currently has no consistency or traction.	6-Month touch points on all events with past participants. "Throwback Thursday" concept. Marketing coordinator needs to schedule and make this a discipline. Possibly enlist a volunteer for each event to help focus on high quality promotional photography and video.					

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 (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Grow the routine office volunteer pool.	Krista assigned to the volunteer coordinator role. Currently have several regular volunteers. Establish a database of prospective volunteers that can be used for both event and general foundation related tasks.	Krista	Implemented the system in 2020 and have been growing it since that time. Have been using volunteers for one-off needs as well as ongoing coordination of event tasks (Taste Auction; Christmas at the Cathedral tickets, etc)	Continued recognition of our volunteer pool. Nominate for Helpline's annual volunteer recognition program. Continue to grow our list to address specific tasks.					
Event registration platform	Research possibility of moving to a new event registration and auction platform.	Krista Event Team	Krista doing research on potential software platforms to replace our existing GiveSmart Program.						
GIFT OF HOPE:									
Work with the Lourdes Center staff to determine direction for 2023 and beyond event.	Determine in early 2022 what direction we desire to go for 2023. Brainstorm with Emily Leedom and other key stakeholders to develop a plan in April/May of 2022.	Event Team Lourdes Center Staff	Currently doing concert format. Lourdes Center Staff desiring a new direction.	Arrive at an agreed upon decision for the future of these events no later than April/May of 2022.					
Marketing strategy - review and determine changes needed to fit our marketplace	Once a direction for future GOH events is determined, work with marketing to determine marketing strategy and plan	Marketing Jan	None	TBD					

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 (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
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 Lourdes Center Staff & Board	Currently working with a 10 member committee that has been in place since 2019 with minimal turn-over. Threat is that these long-term members are getting "tired" and may begin to fade away. Need fresh individuals, ideas and connections.	Expand committee with 4 new members in 2023					
BISHOP'S FISHING TOURNAMENTS:									
Expand Committee Membership, Ensure Succession Plan in place for leadership and committee members as a whole.	Work with current chairs to recruit membership from areas such as Watertown, Milbank, Sisseston, etc.	Jan Fishing Committee Chairs	Current committee has been in place for several years and appear to be tired.	Engage 3-5 new committee members for each location. Create more of a sub-committee chair role, so help reduce the need for all committee members to attend all meetings (fear of meeting burn-out)					
Broader engagement of KC Councils across the diocese	Continue to work with Dan Dwire, Jon Beebe, the State Deputy and the Vocations Director to increase engagement of the KC councils throughout our diocese. Desire to have more KC teams fishing and a stronger commitment with the raffle sales.	Peggy Jan Dan Dwire Jon Beebe Vocations Director	Currently about a dozen KC Councils are actively involved in raffle ticket sale/sponsorship. About 4 councils send KC teams. Need to find someone whose only role on the committees is to contact all councils and recruit/engage.	Participation (financial and attendance with fishing teams at the event) from 25% of the KC Councils in the Diocese.					

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 (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Engage 1-2 new larger sponsorships year over year.	Work with local committee chairs and Gift Planning Officers to brainstorm new opportunities. Focus on businesses that have a connection to fishing or a passion for seminarian education as well as larger parishes.	Jan GPO's Fishing Chairs Vocations Office	Currently have one committee member that assists in recruiting new parishes in giving.	Set a formal meeting the end of March and utilizing the fish participant listing, develop a target list of businesses, individuals and parishes we can meet with. Goal of \$10k increase in first year.					
Add family friendly activities at each event (bouncy houses, duck pond, fishing for a prize, etc.) to draw in more family participation. Perhaps offer these items starting around 2:00 p.m.	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 activities that were offered at Holy Smoke Car Show.	Event Team Local Committees	No family specific events exist at the events, beyond the actual fishing events, with the exception of the youth band that plays during the social at Pierre.	Add one new fun activity at each location this year.					
Revisit consideration of moving one or two larger silent auctions to online platform.	Meet with the past silent auction chairs for input. Select one to two large donated items that we can promote beyond the local "day of" event silent auctions. This could be an opportunity for individuals unable to attend the event in person, to participate.	Event Team Local Silent Auction Chairs	Doing silent auctions at each location via paper format.	Seek one to two large dollar items to put on an online bidding platform. Promote to all past participants (need not be present to win).					
Continue virtual fishing opportunity and increasing participation	1) Re-engage chair for the virtual tournament 2) Heighten promotion/Marketing/Awareness of this opportunity .	Event Team Marketing	Began using an on-line app in 2020 (due to Covid). Continued to offer it in 2021. Not as popular 2nd year as people returned to in-person fishing.	Stronger marketing of this opportunity to all past participants - particularly those that are unable to join us in person at the Pierre or Big Stone events.					
BISHOP'S CUP									

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 (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
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 Marketing	Sold out both courses beginning in 2017 through 2021. 2021 began giving preference for afternoon round to all Eagle and above groups. Morning round was established for individual teams.	Create a clear plan of action & timeline for committees to contact and engage past participants. Continue to sell out in advance.					
Continue to focus on next generation of attendees/givers. Continue to offer the Young Eagle opportunity.	Secure sponsorship commitment from the Young Eagle sponsor (Micah Mauney has supported this level since 2018). Actively engage sub-committee to sell-out the young eagle sponsorships for the tournament. Committee connect with the past young eagle participants to engage them in getting a sponsored team or individual team in place.	Event Team Sub Committee	Sponsor Supports \$2500 in funding. Each player needs to pay \$100 of the \$300 fee, with the sponsorship dollars covering the balance. We open 3 teams of four individuals for this opportunity. Must be new teams and can use this opportunity only one time.	Find a committee member to champion this opportunity. Fill three teams.					
Grow annual revenue by 3% each year.	Opportunities could include: 1) 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. 2) Seek new high level sponsorships 3) Brainstorm with Committee	Event Team Committee Sub Committee Chair	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. Possibly engage Jonathan Buckley from Great Shots for ideas.					
Engage more women to the committee - to help with new ideas to recruit more women.	Contact all recent past female participants to see if any of them are interested in joining the committee (perhaps a sub-committee). Also contact Catholic women who play league to see if there is interest and commitment.	Event Team	Currently we have 2 female committee members.	Increase female membership on the committee by at least 1 in 2022					
TASTE THE GOODNESS									

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

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

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY:	TARGET GOAL 1-YR (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Grow number of sponsorships	Expand the Sponsorship Committee and target 5-10 new prospective sponsors for year 1 and 4 new sponsors for all following years.	Jan	Currently we have 9 sponsors at the \$2500 and above level. Our total sponsorship dollars in 2021: \$56,650	Grow sponsorships by a minimum of 10% in first year.					
Committee Succession Planning	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" (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.	Jan	We have an engaged committee in place, however many have been on the committee for the past 3-5 years and should be given the opportunity to step down. Create a leadership (chair) succession planning / rotation.	Work with new committee chair to seek out millennials and other interested individuals to take on various components of this event.					
Keep the Event Fresh	Work with committee chair(s) and each sub-committee chair(s) to determine new and fresh ideas for this event.	Event Team Committee	Currently offer beer, wine, bourbon and food tastings. Along with silent auction, music and various games (ax throwing, dunk tank)	Creatively expand tasting offerings at this event. Perhaps go back to live music and different interactive games.					
Improved Marketing of this event	Awareness of this event is key to the success. Need to develop a solid marketing strategy early on with specific goals and deadlines.	Jan Marketing Staff Committee Chair	Posters, fliers, coasters, banners, radio promotion, parish and bishop's bulletin ads, word of mouth.	Create a solid marketing strategy to grow awareness of this event. Including securing a sponsor for billboard promotions.					
Strong Auction Committee	Continue to analyze and grow the auction year over year. Bring in fresh offerings.	Krista Jan Event Chair Auction Sub Committee	Auction currently nets about \$40k annually.	Increase auction proceeds by 15%					

NOTRE DAME EXPERIENCE:

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 (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Determine if this event will continue into 2022	Work with the Boehman family to determine future of this event.	Jan Mark	Annual event. With the passing of Vikki Copley, we are not certain if event will continue into the future.	Re-engage the Boehman family to provide tickets.					
Increased Sales Force Sell all 400 tickets	Continue to work with BDHH board to create excitement around this event and ticket sales	Jan Mark	Goal has been to sell out all 400 tickets. 2021 fell short.	Start early and engage BDHH staff and board.					
BISHOP CHARITY HUNT:									
With new Priest Directors at several of the Newman Centers, this is an opportunity to infuse new excitement into this event.	Engage priest directors and committee chairs to create a new level of excitement for this event.	Jan Priest Directors Chairs	2021 we had several new priest directors, who shared their excitement to step up and help grow this event.	Engagement of all Priest Directors and garner their commitment and support for this event.					
Chair rotation	To keep the event fresh, it is important to infuse new leadership.	Jan	The same 3 individuals have been chairing for the past 2 years.	Rotate off one or two of the current chairs and rotate in one new chair.					
Grow committee. New members.	The Bishop's Hunt committee members have been basically the same individuals for the past several years. We need to reach into the attendee list and bring forward some new committee members with fresh ideas and contacts.	Event Team Chairs	Committee currently comprised of same committee members for the past several years.	Grow the committee by 4 new and engaged members in 2022					
Increased net revenue by 10% over past year.	Work with chairs and committee members to determine avenues to increase net revenue. Some means include 1) increased sponsorships, 2) increased priest sponsorships, 3) Quality Live and Silent auction packages, 4) Ghost bidders	Event Team Event Chairs Committee	\$XXX 2018 revenue	Increase revenue by 10% (to be determined with collaboration of committee chairs and committee)					
Maintain Attendance levels	In 2021 we essentially sold out. If we look to increase attendance in 2022 and beyond, lodging is the issue. We would have to work with Lodge to determine how we can accommodate any increase in attendance.	Event Team Horseshoe K Committee	Attendance at 100 is max due to lodging availability.	TBD					
Continue efforts to bring the next generation.	Focused marketing on making this a "Family tradition" to bring in the next generation.	Event Team Marketing Committee	Each year we see one to two new "generational" hunter groups.	Focused asks to existing participants to bring their son/daughter to the event.					

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

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

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY:	TARGET GOAL 1-YR (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Target needs of the Newman Campus Ministries	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.	TBD	Solicit a list of "needs" from each Newman Center to promote via a "Fund a Need Board"	Add them to "buy it now" option on the auction platform.					
Heightened marketing of all aspects of this event. Target both attendees and non-attendees who may desire to support Newman Catholic Campus Ministry.	1) Start early with a marketing plan. 2) Use of video clips from those who are currently utilizing Newman Campus Ministry or those who have benefitted from these services in the past; 3) recreate emotions from last year through the use of photos and stories	Jan Marketing	Traditional marketing formula	Elevated awareness of all opportunities within this event to support Newman Catholic Campus Ministry					
CHRISTMAS AT THE CATHEDRAL:									
Continued community partnerships and involvement with Wednesday night performance. Ensure that The Banquet does not overlap with our event on the same night.	Currently we offer: Gifts for children attending (through a grant from Sioux Valley Energy) , Fazoli's provide a meal, Community donating cookies, gift cards for adults (via Spader family).	Event Team	Beautiful partnerships exist with the community allowing us to provide a meal, reception, gifts for children, and adult attendees.	Increase attendance - ensure The Banquet does not hold their annual hygiene package giveaway on same evening. Work on perhaps a 3rd bus to bring individuals from the Westside Banquet.					
Valet Parking - at all concerts	Work with current valet parking chairs (Boyums) to determine feasibility and reality of bringing in more volunteers. Perhaps target some special groups within the Cathedral Community to support this.	Event Team Boyums Cathedral Parish	Currently do 3 of the 6 shows. (Thursday, Friday and Saturday nights)	Offer at all 6 performances.					

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 (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
<p>Develop a Fundraising Committee that would help make calls to past patrons and pew sponsors.</p>	<p>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.</p>	<p>Event Staff BDHH Development Director Cathedral Rector</p>	<p>This task is currently managed by staff at this time.</p>	<p>Identify one-two individuals who would be willing to volunteer about 80 hours in September and October.</p>					
<p>Increase Sponsorships</p>	<p>In 2021 we ended with 6 Presenting levelop Sponsors (Avera x 2; Premier; Billion; HyVee; SD Furniture Mart (came in too late to get promotion). Ensure all 6 are recommended by August 1 of each year. Currently have XXX at \$10K Level, XXX at \$5K Level and XX Patron Pews and XX Patron Sponsors. In 2021 Cameo provided comp tickets for law firms to attend with the desire that perhaps some will step forward and sponsor in 2022. To increase in Pew and Patron sponsons, hold a strategy session with the event team and 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.</p>	<p>Event Team Gift Planning Team Mark</p>	<p>In 2021 we ended with 6 Presenting levelop Sponsors (Avera x 2; Premier; Billion; HyVee; SD Furniture Mart (came in too late to get promotion). Ensure all 6 are recommended by August 1 of each year. with opportunity to add one more). Currently have XXX at \$10K Level, XXX at \$5K Level and XX Patron Pews and XX Patron Sponsors</p>	<p>Have all 6 presenting level sponsorships renewed and increase the \$10k and \$5k levels by 2 each. Increase patron pews by 5.</p>					

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 (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
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 also the entire Foundation Team.	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).	Event Team Management Team	Post event we close the Event Office as early as possible to allow Event Team to complete necessary holiday preparations.	Pre-Advent, create a focused schedule that allows for time off during the weeks of Thanksgiving leading up to C@C, ensuring adequate coverage of phones and associated planning needs.					
Pursue an electronic option for ticketing	Maybe an opportunity. Need to evaluate.	Events Team	Physical tickets	Pursue opportunities					
Sell out all performances.	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 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) Determine who the Sunday night performance may be dedicated to.) Other ideas to be determined	Event Team Marketing Mgmt Team	In 2021, due to Covid, we reduced our overall number of tickets available We did not sell out, however capacity was comfortable. Sunday night's performance had room for more sales.	Determine ticket sales goals and sell out all performances accordingly.					

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Administrative/Database - Tony, Barb

GOAL: Maintain integrity of database/Accurate and efficient reporting

STRATEGY:	ACTIVITIES:	COST:	WHO:	BASELINE TODAY (2022):	TARGET GOAL 1-YR (2023):	ACTUAL 1-YR (2023):	TARGET GOAL 2-YR (2024):	ACTUAL 2-YR (2024):	TARGET GOAL 3-YR (2025):	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	Time	All							
	Backup documentation for all pledges	Time	GPO/Barb							
	Create and Maintain Audit Procedures	Time	Barb							
Database										
	Training the team	Time	Barb	Still hiring the team and determining duties						
	Ensure data carries over properly	Time	Barb/Ana/Tony							
	Identify and evaluate retention of various historical data	Time	Tony/Barb							
	Research alternative database programs	Time	Tony							
	Research efficient ways to create reports	Time	Tony/Barb/Ana							
Specific Ministries										
Newman Centers	Creating procedures and expectations for the sake of clarity	Time	Ana							
Lumen Christi	strengthen communication for clarity in expectations	Time	Ana							
Procedures										
Create transparency and efficiency within our procedures	Prepare current procedures for all routine administrative duties and keep in common place	Time	All							
	Find inefficiencies and inconsistencies	Time	All							
	Find solutions from both within and outside the Foundation	Time	Tony							
	Communicate and educate the best procedures to those impacted	Time	All							

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Catholic Family Sharing Appeal/ Grant Distributions - Tony, Mike, Patty

GOAL: Increase participation by 10%

STRATEGY:	ACTIVITIES:	WHO:	BASELINE 2022:	TARGET GOAL 1-YR (2023):	ACTUAL 1-YR (2023):	TARGET GOAL 2-YR (2024):	ACTUAL 2-YR (2024):	TARGET GOAL 3-YR (2025):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
Update process of how we do CFSA									
	Meet with the Diocese and Priests to cast vision, garner ideas, and create buyin								
	Research best practices from other dioceses								
	Strengthen the processing to create more efficencies								
Pastor Focus: Using CFSA as a way to increase annual parish income									
	Identify and invite six new pastors to work with in 2022								
	Coach on how to talk and communicate ministries supported by CFSA								
	Work with pastor and finance council on the message and ask of parishioners								
	Send bi-monthly email to parishes as follow-up to monthly conversations								
	Create communication plan to move people from giving from excess to giving from "first fruits"								
	Establish stewardship communication/vocabulary								
	Addition of Community Office Collaboraton								
	Review and revise focus of followup								
	Explore and expand us of recurring donations								
	Next step - endowments and estate planning with donors.								
Parish Support - Parish Focus									
	Send monthly reminders of timeline and to dos								
	Mentor new parish secretaries on process, tracking, recording, following up								
	Review, revise and provide user friendly parish resources								
	Distribute parish resources electronically where feasible								
	Automate transfer of pledge/payment information to eliminate duplication of databases								
	Communicate online donors to parishes monthly								
	Thank and communicate whenever reports are turned in								
	Conduct Deanery Thank You Lunches								
Promote Charitable Estate Giving									

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Marketing - Jan, TBD

GOAL: Develop a project management & workflow process

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY (2022):	TARGET GOAL 1-YR (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
PROJECT REQUEST FORM									
Continued use of the project request form to ensure complete clarity of all one-off projects.	Complete and forward Project Request form to prior to the inception of all one-off projects. This is to ensure all stakeholders understand the scope of the project and the desired outcome is achieved. If necessary, schedule an in-person discussion/meeting prior to roll out of project to ensure complete clarity among all parties.	Stakeholders Marketing Team	Form is accessible to all staff. Once completed and all approvals are in place, it should be forwarded to Marketing.	All staff comfortable with the form and using on a routine basis, ensuring complete clarity.					
PROJECT MANAGEMENT									
Continued use of the project management tool "MONDAY". The desire of this tool to track the progress of all marketing related tasks.	The agreed upon project details 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 Marketing Team	Most projects and campaigns have been entered. Needs to be rejuvenated. Ensure that access to this information is provided to identified stakeholders.	All projects tracked and monitored on a daily / weekly basis.					
WEEKLY TOUCH-PT MTGS									
Weekly regular meetings between the Director of Marketing and the Marketing Coordinator. Additionally a monthly meeting will be held between the designated Gift Planning Officer liaison and the Marketing team. This will be an opportunity for the stakeholders and marketing to discuss the status of all campaigns and associated strategies.	Weekly touch points within the Marketing team and monthly meetings with GPO liaison to all projects are moving forward in an acceptable direction. Determine adjustments in the schedule as deemed necessary.	Marketing Team Stakeholders	Weekly meetings among the Marketing Team are held on Mondays. Monthly meetings were to begin with GPO liaison, however this has been on hold.	Weekly and Monthly meetings occurring as scheduled. All parties feeling informed of project status.					
Post event: WRAP-UP MEETING									
Opportunity for Event Team and Marketing to come together to understand which tactics worked and which did not. Tracking of numbers and elements used. This is a chance to better the campaign for next year, and learn lessons.	Meeting to be used to discuss tactics and strategies which worked and did not work in order to improve for next time.	Marketing Team Event Team Other Stakeholders	Post event analytics are being tracked, discussed and documented.	Routine post event meetings.					

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Marketing -
Jan, TBD

GOAL: Develop a project management & workflow process

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY (2022):	TARGET GOAL 1-YR (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
PROJECT REQUEST FORM									
GOAL: WEBSITE UPDATE									
COMPELLING CONTENT									
It has been determined that our current website does not meet the expectations of the Foundation Team and our Board of Directors. Implementation of a new website in place.	New website content and layout has been reviewed by all stakeholders. Sought advisement of outside website experts. Three phase roll out established. Phase one nearly complete.	Marketing Team With input from Mgmt Team and other stakeholders as determined	Phase one is about 40 hours from roll out. Website roll out has been placed on temporary hold pending the hiring of a new Marketing Coordinator.	Desire to have new website fully executed by 6-30-23					
TELL OUR STORY - Create compelling 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. Keep content fresh and relevant.	Marketing GPO's All Staff	We are currently telling our story through bi-monthly newsletter with stories linked back to the website, our annual report and social media.	Continued bi-monthly e-newsletter with "tease stories" to drive them to our website. More creative us of social media to share our mission and vision and specifically WHAT GPO's do, etc.					
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 giving, endowments, etc. This will be done through the use of marketing brochures, rack cards, website content, etc. Additionally we will expand the use of social media posts to enlighten the diocese of WHAT the PG staff can do. Content will be driven through a collaborative effort between the GPO's and Marketing. Additionally we will utilize our quarterly newsletter to share the latest news from the CCFESD.	Marketing Team Gift Planning Officers	E-newsletter offered on a bi-monthly basis. Social media posts for events are scheduled and relevant to the event needs. GPO's and marketing need to work on a strategy for ongoing social media content and posts reflecting the gift planning opportunities and activities.	By 6/30/23, Marketing will have established a solid system for communication to our constituents. This will include bi-monthly newsletter content, social media, and website.					
BETTER SEO									

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

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PROJECT REQUEST FORM									
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.	Marketing Coordinator	Currently pages all have SEO plug in available and in use. Have been focused on pages versus individual posts. Will use suggestions from plug-ins to get best SEO results. Will keep this as a focus as we develop new website layout.	By 6/30/23, all pages will have a full SEO strategy in place. lude SEO.		-			
GOAL: DEVELOP A STRATEGIC MARKETING PLAN FOR THE PLANNED GIVING STAFF FOR ALL PROJECTS AND CAMPAIGNS									
YEARLY MARKETING CAMPAIGNS									
Position the gift planning team as the number one source of donor directed giving information and help grow the awareness of who they are 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.	Gift Planning Team Marketing	Happening, however there are many missed opportunities. Need to work closer with GPO's in the area.	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.					
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.	Gift Planning Team Marketing	Currently using social media, e-newsletter with linked stories to website and annual report to share stories.	Continue to work with GPO's to find new and creative ways to share stories.					
GOAL: GROW AWARENESS, PUBLIC PERCEPTION, & TRUST FOR THE CCFESD & ALL COMMUNITY OFFICES									
SOCIAL MEDIA PRESENCE									
Consistent and organized social media presence.	Coordinated social media calendar to contain both events and GPO related posts.	Marketing Team GPO's	Calendar in place. Has been lacking input from GPO's.	Collaborative effort between Marketing, Evens and GPO's to have an annual social media schedule / calendar in place.					
GROW BRANDED MATERIALS									

CATHOLIC COMMUNITY FOUNDATION FOR EASTERN SOUTH DAKOTA - GOAL SETTING WORKSHEETS

PRIORITY AREA: Marketing -
Jan, TBD

GOAL: Develop a project management & workflow process

STRATEGY:	ACTIVITIES:	WHO:	BASELINE TODAY (2022):	TARGET GOAL 1-YR (2022-23):	ACTUAL 1-YR (2022-23):	TARGET GOAL 2-YR (2023-24):	ACTUAL 2-YR (2023-24):	TARGET GOAL 3-YR (2024-25):	SUCCESS/COMMENT/STATUS: "-" Behind, "0" On Schedule, "+" Ahead
PROJECT REQUEST FORM									
Continue to evaluate and create materials for the CCFESD to use and share to help grow the overall brand awareness across our diocese.	Determine extent, including budget, of branded materials we desire to have in place to help grow the brand awareness of the CCFESD within the diocese.	Marketing GPO's	Pens, pins, pocket rosaries, rackcards, and all event give away items. Each office location has their own pop up banners.	Consider other items currently not being in place such as placemats to parishes to use at funerals, etc. Add a couple more table cloths.	-				
EVENTS									
Collaboration with Event Team on all marketing needs	Refer to Event Plan for details	Marketing Event Team	Great collaboration in place.	Create some fresh and new event materials.					