



CATHOLIC FOUNDATION

of Southern Minnesota



Fundraising in Times of Adversity
2019 International Catholic Stewardship Council Conference
October 7, 2019
Monica Herman

Our Mission

The Catholic Foundation of Southern Minnesota supports parishes, schools, cemeteries, and individuals with the necessary resources to be vibrant centers of faith and service in southern Minnesota and assist faithful Catholics in fulfilling their stewardship call.



Objectives of the CFSM

- Strengthen and grow the Foundation to provide development/stewardship services
- Enhance and promote Catholic philanthropy in southern Minnesota through effective donor engagement

CFSM Services

- **Catholic Ministries Appeal:** provide gift entry, process gift acknowledgments, create and promote compelling materials and customized support to help parishes meet or exceed their annual goals
- **Investment/Endowment Planning and Management:** endowed funding provides a permanent source of revenue that supports the work of the church in perpetuity
- **Stewardship and Offertory Enhancement:** an offertory program that invites families to reflect upon the vital work of the parish & consider increasing their time, talent and financial support
- **Planned Giving:** a variety of giving options are offered to provide long term support to various entities in the Diocese to build a financially sustainable future
- **Capital Campaigns:** campaigns designed to address large scale projects at parishes, schools and other Catholic entities

Fundraising in Times of Adversity

- Importance of a Communications Plan for Foundations
- Responding to inquiries from donors, press, parishes
- Importance of clear documentation of donor restrictions
- Relationships with the Diocese
(employees/offices/website/marketing materials, etc.)
- Results on Catholic Ministries Appeal 2018 & 2019

Preparation

- Review all 70+ funds and supporting documentation
 - Cannot begin soon enough
 - Agreements signed? Supporting documents available?
 - Who does the fund belong to (parish, CFMS, cemetery, school, individuals, Diocese)
 - What are the restrictions/designations and have we followed them? Endowment, Agency Agreement, etc?
 - Do your research and connect all dots
 - Work with auditors, financial advisors, attorneys, PR firms

Timeline

WEEK OF NOVEMBER 12-16, 2018

DRAFTS OF TALKING POINTS, Q & A, STATEMENT FROM EXECUTIVE DIRECTOR, MEDIA STANDBY STATEMENTS TO SUPPORT MESSAGING TO KEY INTERNAL AND EXTERNAL STAFF AND KEY DONORS/SUPPORTERS

PREPARE PLAN TO RESPOND TO MEDIA

REVIEW LETTER FROM EXECUTIVE DIRECTOR MAILED TO 30,000 HOUSEHOLDS



Timeline

WEEK OF NOVEMBER 19, 2018

**DIOCESE MAILS LETTER FROM BISHOP TO ALL HOUSEHOLDS
ANNOUNCING DECISION TO FILE CHAPTER 11, BEFORE THE END OF
NOVEMBER**

**REVISE NEW MEDIA STANDBY STATEMENT RELATING TO THE
BANKRUPTCY ANNOUNCEMENT**

**COMMUNICATION MATERIALS INCLUDING STATEMENT FROM
EXECUTIVE DIRECTOR, FACT SHEET AND Q & A ON HOW THE
BANKRUPTCY IMPACTS THE CFSM WILL BE POSTED ON THE CFSM
WEBSITE**



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Timeline

WEEK OF NOVEMBER 26, 2018

REVIEW DRAFTS OF LETTER FROM CFSM TO ALL HOUSEHOLDS
ADJUST SPEAKING POINTS DEPENDING ON RECEPTION OF INTERNAL
AUDIENCES AND PUBLIC

NOVEMBER 30, 2018 – DIOCESE OF WINONA-ROCHESTER FILED BANKRUPTCY PETITION

WEEK OF DECEMBER 3, 2018

CFSM MAILES LETTER FROM EXECUTIVE DIRECTOR EXPLAINING PROCESS
AND WHAT IT MEANS FOR CFSM



Timeline

WEEK OF DECEMBER 10, 2018

**BEGIN REVIEWING CONTENT FOR 2019 CATHOLIC MINISTRIES
APPEAL – WHICH LAUNCHES FEBRUARY 17TH, 2019**



CFSM Response to inquiries from donors, press, parishes

PREPARE FOR THE WORST AND HOPE FOR THE BEST

ZERO CALLS FROM PRESS

MINIMAL CALLS/LETTERS FROM DONORS

MINIMAL CALLS FROM PARISHES/INVESTORS



Importance of clear documentation of donor restrictions

ALL FUNDS/INVESTMENTS/ENDOWMENTS REQUIRE SIGNED AGREEMENTS

CATHOLIC MINISTRIES APPEAL FUNDS DIOCESE MINISTRIES, NOT LEGAL FEES OR VICTIMS FUND

IF A QUESTION, CLARIFY WITH DONORS, DON'T ASSUME



CFSM Relationship with the Diocese of Winona-Rochester

CFSM LEGAL SEPARATE ENTITY
OFFICE IN SEPARATE LOCATION
CONTRACTED TO PROVIDE FUNDRAISING, GIFT
ENTRY, DATABASE MANAGEMENT
SHARED SERVICES FOR BENEFITS & ACCOUNTING
STAFF
MAINTAIN CURIA MEMBERSHIP



Results of Catholic Ministries Appeal 2017 & 2018

CMA17 (AS OF 12/31/17)

GOAL \$2M

TOTAL RAISED = \$1,932,825

SHORTFALL = \$334,643

RETURN TO PARISHES = \$210,549

PARISHES OVER GOAL = 34

DONORS = 7,151

CMA18 (AS OF 12/31/18)

GOAL \$2.1M

TOTAL RAISED = \$2,169,671

SHORTFALL = \$311,618

RETURN TO PARISHES = \$384,344

PARISHES OVER GOAL = 47

DONORS = 6,929



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Results of Catholic Ministries Appeal 2019

CMA19 (AS OF 10/1/2019)

GOAL \$2.1M

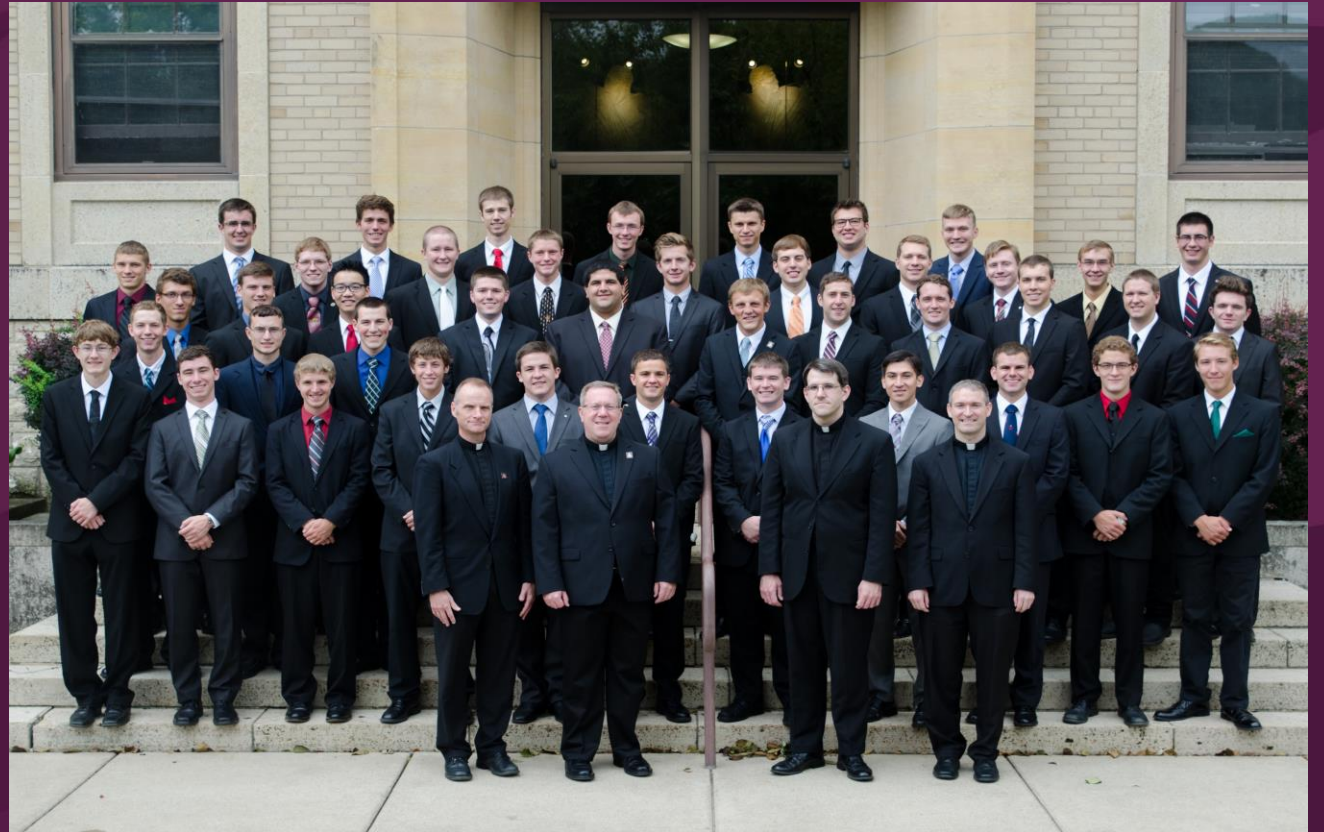
TOTAL RAISED = \$1,807,030

SHORTFALL = \$ 474,533

RETURN TO PARISHES = \$116,228

PARISHES OVER GOAL = 34

DONORS = 5,897



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Questions?



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