



To: Ministries Foundation Board of Directors  
Date: August 19, 2022

1. Welcome to our new fiscal year! We are excited to host a **LIVE** board meeting – our first since February 2020. We will celebrate by having a social hour immediately following the board meeting. I hope you can stay around for a little bit and get to know us and other board members. It's been a long time!
2. This will certainly be a year of great change. The staff and I are ready for it and, in our minds, it can't happen soon enough. We eagerly await the new future-oriented and outcome-based story to tell donors. We have done remarkably well maintaining our fund-raising using our current story. Our existing donors are loyal and generous, but it is clear to us that this we need to highlight significant outcomes and results to attract new donors.
3. We have spent time this month analyzing FY 2022. This chart identifies our donors by gift range:

Breakdown 2021-2022	Total # Donors	% of Total Donors	Total # Gifts	% of Total # of Gifts	Total Revenue*	Percentage Total Revenue	Designated Funds	Unrestricted Funds
\$10,000+	16	1%	36	1%	\$277,813	28%	\$191,974	\$85,839
\$5,000 - \$9,999	24	1.5%	56	1.7%	\$145,472	14%	\$73,610	\$71,862
\$2,500 - \$4,999	53	3.3%	102	3.1%	\$152,001	15%	\$85,018	\$66,983
\$1,000 - \$2,499	149	9.2%	403	12.3%	\$188,767	19%	\$83,263	\$105,504
\$500 - \$999	177	11%	603	18.3%	\$103,278	10%	\$37,041	\$66,237
\$100 - \$499	660	41%	1,457	44.3%	\$117,980	12%	\$40,235	\$77,745
\$99 and under	522	33%	630	19.3%	\$21,100	2%	\$5,046	\$16,054
Total	1,601	100%	3,287	100%	\$1,006,411	100%	\$516,187	\$490,224

Total revenue from annual giving is \$28,000 more than last year. (This does not include grants and estate gifts.)

Our total number of donors is down 197 from FY 2021, an 11% decline.

Total number of gifts declined by 10%.

All of this decrease is in our \$499 and under donors. We posted gains in the other 5 categories (\$500-\$10,000).

Some observations:

- 24% of our donors account for 86% of the total revenue.
- Many of the donors in the \$2,500 and up levels are corporate sponsorships (mainly for the Carondelet Celebration). We were working on pulling out the number of individual donors in these categories.
- Our donations are holding steady while # donors declines.
- Committed donors are as generous as ever, even slightly more generous, but they won't last forever. We lose more of these donors each year.

- With approximately 90% of the number of last year's donors and 90% of the number of donations, we raised 3% more than last year.
- Gifts designated to ministries increased while unrestricted has declined slightly from FY 21. (In fact, the difference is almost exactly the amount of one large memorial gift that came in FY21, so, in essence, giving is flat.)

4. **2021-22 Annual Fund:** Our final annual fund numbers will come from the auditors in August. According to our unaudited reports, we raised \$1,770,000 in total annual giving, \$10,000 more than budgeted. Unrestricted donations were below goal, while contract fees and grants were above goal. Our expenses appear to be \$50,000 - \$60,000 below budget. Designated donations and Celebration revenue increased 13% and 20%, respectively, over last year, but still under goal.

As of June 30, 2022						
		Year to Date	Budgeted Year to Date	2021/2022 Budget	2020/2021 Year to Date	2020/2021 Total
<b>Operating Revenues:</b>						
(Unrestricted)						
	Annual Fund	\$494,129	\$600,000	\$600,000	\$591,256	\$591,256
	Contract Income	\$101,425	\$100,000	\$100,000	\$50,233	\$73,155
	Operating Grants	\$0	\$0	\$0	\$0	\$0
	Septemberfest	\$2,000	\$5,000	\$5,000	\$8,040	\$8,040
	<b>sub total:</b>	<b>\$597,554</b>	<b>\$705,000</b>	<b>\$705,000</b>	<b>\$649,529</b>	<b>\$672,451</b>
<b>Ministry Revenues:</b>						
(Designated)						
	Grants	\$617,050	\$350,000	\$350,000	\$508,010	\$508,010
	Donations	\$186,645	\$305,000	\$305,000	\$164,605	\$164,605
	Carondelet Celebration	\$273,965	\$300,000	\$300,000	\$227,421	\$227,421
	Other Events	\$0	\$0	\$0	\$0	\$0
	Wills & Bequests to Ministries	\$20,855	\$100,000	\$100,000	\$515,816	\$515,816
	Wills & Bequests to Endowment	\$74,487	\$0	\$0	\$0	\$0
	<b>sub total:</b>	<b>\$1,173,002</b>	<b>\$1,055,000</b>	<b>\$1,055,000</b>	<b>\$1,415,852</b>	<b>\$1,415,852</b>
	<b>TOTAL:</b>	<b>\$1,770,556</b>	<b>\$1,760,000</b>	<b>\$1,760,000</b>	<b>\$2,065,381</b>	<b>\$2,088,303</b>

5. **2022-23 Annual Fund:** One way we're addressing the decline in donors is to make "entry level" gifts more fun, attractive and easy through peer-to-peer fundraising. I kicked off our "Miles for a Mission" project by biking to Lake Michigan last week. We generated lots of social media buzz and raised more than \$6,200. It will NOT be an annual event.

So far we have four other "activity based" funding activities planned for August and September. We

hope through social media to spread the word and bring in new donors in the \$25-\$100 levels.

Because of the Miles for a Mission project, our Annual Fund jumped out of the gate this summer. We will launch our first appeal for our Annual Fund immediately after Labor Day.

Grant writing is starting out very strong due to two large grants awarded to St. Mary's Health Clinics. Paul continues to work on more grants for the Clinics as well as exploring grant opportunities for the Newly Designed Organization.

Here is how our Annual Fund is as of August 17:

Ministries Foundation Comparison Statement of Fund Raising Activities -- FY 2022/2023						
As of August 17, 2022						
		Year to Date	Budgeted Year to Date	2022/2023 Budget	2021/2022 Year to Date	2021/2022 Total
<b>Operating Revenues:</b>						
(Unrestricted)						
	Annual Fund	\$32,811	\$20,000	\$600,000	\$37,337	\$591,034
	Contract Income	\$4,116	\$4,000	\$90,000	\$0	\$50,233
	Estate Gifts	\$0	\$0	\$100,000	\$0	\$515,816
	Operating Grants	\$0	\$0	\$0	\$0	\$0
	Septemberfest	\$2,000	\$2,000	\$5,000	\$0	\$8,040
	<b>Sub Total:</b>	<b>\$38,927</b>	<b>\$26,000</b>	<b>\$795,000</b>	<b>\$37,337</b>	<b>\$1,165,123</b>
	Newly Designed Organization Transition Expenses	\$0	\$0	\$355,000		
	<b>Total:</b>	<b>\$0</b>	<b>\$0</b>	<b>\$1,150,000</b>		
<b>Ministry Revenues:</b>						
(Designated)						
	Grants	\$347,350	\$30,000	\$350,000		\$508,010
	Donations	\$8,196	\$10,000	\$325,000	\$35,995	\$164,605
	Carondelet Celebration	\$0	\$0	\$300,000	\$1,000	\$227,421
	Other Events	\$0	\$0	\$0	\$0	\$0
	Wills & Bequests to Endowment	\$0	\$0	\$0	\$50,465	\$0
	<b>sub total:</b>	<b>\$355,546</b>	<b>\$40,000</b>	<b>\$975,000</b>	<b>\$87,460</b>	<b>\$900,036</b>

6. **Septemberfest** as a live event is coming back! Mark your calendars for Thursday, September 8 from 5 – 8 pm for what we hope will be a great way to say “Welcome Back” to our donors, volunteers, friends and neighbors. Join us for beer, food trucks, music, petting zoo, and more!
7. We also are planning two fundraising events for St. Mary’s Health Clinics for September and November. The first will be an open house celebrating its 30<sup>th</sup> anniversary on a weekend date in mid-September. We will also host a happy hour/reception for SMHC higher-level donors in November.
8. The staff is busy moving forward while eagerly (and maybe even anxiously) awaiting information about the Newly Designed Organization. We are trying to not work out of the “on hold” model and are moving ahead and trying new ways to generate funds, but we all look forward to a new and enhanced story to tell.

Specifically, Mimi is developing and coordinating at least one special event/donor event per month.

Paul is pursuing grant opportunities for the Ministries Foundation as it proceeds with this transition. He is currently preparing a draft for the St. Paul Foundation’s Management Improvement Fund (process opens August 8) and is looking ahead by researching grant opportunities for the other programs once they are in the new organization.

9. One area that I am working on is a deep dive into our St. Joseph Society (wills and bequests) to gain a more accurate and updated sense of who’s in it. I plan to call each of the 100 or so people that I have on our list.

Thank you for all you do!

A handwritten signature in blue ink that reads "Ralph Scorio". The signature is written in a cursive, flowing style.

Ralph Scorio  
Executive Director