

5-Year Strategic Plan

2016

2017

2018

2019

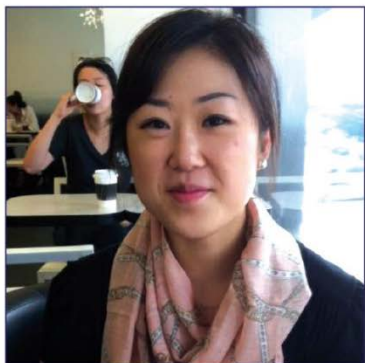
2020

2021

Mar. 2, 2016

FRAMEWORK | BRAND IDENTITY
INFRASTRUCTURE | ENGAGEMENT

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1 | Purpose of the Plan

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Purpose of the Plan

The 2016-2021 NFCRV National Strategic Marketing Plan is a comprehensive plan outlining the creation of a branding campaign and the framework to build awareness, generate engagement, and elicit ongoing financial support for the National Fund for Catholic Religious Vocations.

The plan, to be rolled out over the next 5 years is strategically responsive to the “new normal” of low awareness of religious life and changes in trends among practicing Catholics and is in alignment with the overall mission of the National Fund for Catholic Religious Vocations to increase vocations to religious life by eliminating the challenge of educational debt.

The Strategic Plan will also be a key component of NFCRV’s overall Organizational Development Plan and serve as a roadmap for the necessary infrastructure required annually to advance the NFCRV’s key marketing mission and objectives:

Marketing Mission: Develop and maintain marketing campaigns and programs that will keep the NFCRV among the top five priority gives of all donors.

Marketing Objective: Increase vocations to religious life by 10 percent in the next decade by eliminating the obstacle of educational debt

Background

In 2012, The National Religious Vocation Conference conducted a study that confirmed what religious communities had long known anecdotally: Educational debt is an obstacle to religious vocations.

With the average serious inquirer carrying \$28,000 in educational debt, vocations to religious life are being lost or deferred each year because religious communities cannot afford to assume the student loan payments of new members.

According to the study, 69 percent of responding religious institutes turned away at least one person because of student loans and a third of formal applicants quit because of educational debt

Armed with this knowledge the NRVC was able to secure a major grant from the Conrad N. Hilton Foundation to establish the National Fund for Catholic Religious Vocations. And with a start-up grant from the GHR Foundation, the NFCRV was able to staff an office and hire Mark J. Teresi, C.F.R.E., an accomplished Catholic fundraiser, to direct the Fund.

NFCRV mission

The National Fund for Catholic Religious Vocations serves as a sign of hope in the future of consecrated life and is dedicated to increasing the number of women and men entering religious communities. The Fund will accomplish this goal by:

- Offering financial assistance to religious institutes so that they may accept candidates who have student loan obligations;

THE 2016-21 STRATEGIC PLAN, CAMPAIGN BRAND DEVELOPMENT, FRAMEWORK, AND ENGAGEMENT WILL GUIDE NFCRV'S MISISION BY PROVIDING RESEARCH AND CONTEXT TO DETERMINE NECESSARY INFRASTRUCTURE AND ALLOCATION TO SPECIFIC TARGETS AND PROGRAMS.

- Assisting congregations in developing policies and resources so that they may work effectively with those who have educational debt;
- Inviting contributors to invest so that the vital legacy of religious life continues for the Church and the world.

The Fund awards grants based on need. Any canonically recognized religious institute with membership in the National Religious Vocation Conference may apply for a grant to service a candidate's educational debt during formation.



2 | Executive Summary

2016

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Executive Summary

NFCRV's 5-Year Strategic Plan is a comprehensive framework designed to guide the organization's efforts to eliminate educational debt as an obstacle to religious vocations, in a way that provides foundational structures, optimizes funding, builds on experience, leverages partnerships, and is responsive to the current Catholic context.

Background

Catholic religious vocations have experienced an increase in interest and inquiries among young men and women since 2000, according to the 2009 NRVC/CARA *Study on Recent Vocations* and the annual *VISION Vocation Guide* reader engagement statistics.

The majority of these inquirers have college degrees and many have advance degrees. Religious communities, most of whom require candidates to be debt-free upon entrance, had to turn away or defer entrance to serious inquirers who average \$28,000 in educational debt.

In 2012, the National Religious Vocation Conference, a respected professional organization of Catholic religious vocation directors with a 25-year history representing over 300 religious communities, conducted a study to determine the extent of the challenge of educational debt to religious life. The study found that 69 percent of responding religious institutes turned away at least one person because of student loans and a third of formal applicants quit because of educational debt.

In 2015, through the help of a grant from the Conrad N. Hilton Foundation, the NRVC established the National Fund for Catholic Religious Vocations as a separate 501(c)3.

Moving Forward

Because the Fund is a startup, it requires a Brand Identity Campaign in conjunction with

an infrastructure outline to determine the resources necessary to build support and sustainability of the fund.

The 2016-21 Strategic Plan takes a three-phased approach to create awareness and engagement among the philanthropic community and all segments of the Catholic market. The plan leverages its association with members of the National Religious Vocation Conference as well as longtime connections in the Catholic community.

The plan begins with the pre-plan rollout designed to secure funds and build partnerships to support the Brand Identity Campaign that pinpoints the following targets:

- Phase I: Target \$500K plus
- Phase II: Target \$10K - \$50K
- Phase III: Target \$1-\$5K

Each phase of the campaign will involve an approach and deliverables not mutually exclusive to that phase, particularly the development of tools, services, and collateral that will be created for one audience and adapted for another.

The central focus of the plan is to meet the \$100 million goal over the 5-year timeframe and build ongoing engagement with donors in support of Catholic religious communities and vocations to religious life.

The plan addresses the challenge of low interest in and limited information about religious vocations based on recent studies along with the easily understood obstacle of educational debt.

The faith and spiritual needs of potential donors are also taken into account to help create an environment that will foster consideration, support, and advocacy for the fund and new vocations.

The anticipated result of these efforts will be a 10 percent increase in religious vocations in the U.S. by 2025 which will equate to:

- 1,170 New Priests
- 4,854 New Sisters
- 420 New Brothers

WHY RELIGIOUS VOCATIONS MATTER:

RELIGIOUS SISTERS, BROTHERS, AND PRIESTS NOT ONLY PROVIDE WITNESS TO CHRISTIAN VALUES AND LIFESTYLE, BUT THEY ARE THE FOUNDERS AND CONTINUING LIFEBLOOD OF EVERY MAJOR SOCIAL SERVICE IN THE U.S. AND ACROSS THE GLOBE.

(See page 17 for a list of the many ministries currently supported by religious communities)

The plan encourages strategic partnerships with Catholic organizations to generate awareness, practical input, and support among all segments of the Catholic population, starting with NFCRV board members, NRVC board and members, major Catholic donors, and people in the pew. In addition, other individuals and groups supportive of the contributions of religious institutes will be a secondary source for strategic connections.

The 2016-21 Strategic Plan is infused with opportunities to reach greater, yet very targeted audiences, based on a 7-9 percent budget of the overall campaign goal. Although there may be tough marketing choices ahead as other Catholic organizations compete for donors, by building strategic partnerships, infrastructure, and effective monitoring, NFCRV will lay the foundation to becoming an essential source of support to Catholic religious communities in the years ahead.

Strategic Framework

The strategic framework used to create the 2016-21 Strategic Marketing Plan, a 5-year road map for annual marketing, is based on the NFCRV's overall mission and objective.



MISSION DEVELOP PROGRAMS THAT WILL EFFECTIVELY ERRADICATE THE OBSTACLE OF EDUCATIONAL DEBT TO RELIGIOUS VOCATIONS.

KEY OBJECTIVE INCREASE VOCATIONS TO RELIGIOUS LIFE BY 10 PERCENT BY 2025 AND CONTINUE TO SUPPORT RELIGIOUS VOCATIONS IN THEIR EFFORTS TO ACCEPT NEW MEMBERS

QUICK LOOK

THE FRAMEWORK FOR THE PLAN INCLUDES STRATEGIC PARTNERSHIPS, RESEARCH, ANALYSIS, MARKET TESTS, AND FOUR CORE OBJECTIVES THAT ARE OUTLINED ON PAGES 12-13.

Strategic Framework (CONTINUED)

GOAL	AWAKEN THE NEED	FOSTER SUPPORT	CONVERT
TASK	Maximize awareness and reach to our targets.	Deliver relevant messages to audiences which include: supporters, devotees, philanthropically inclined, discerners and religious vocation-focused, special appeal groups, in memoriams, and others.	Connect to prompt for action to get donation at the moment of impact.
BARRIERS	A new campaign with limited resources.	Highly competitive environment for religious philanthropic dollars.	Questions about impact of support (i.e., Will my donation truly help eliminate this obstacle?).
STRATEGY	Tout the continued interest in religious vocations and their need for the future of the church. Showcase the barrier of educational debt.	Optimize communications for multi-exposure reach. Serve specific messages to those predisposed to be receptive.	Give consumers “reasons why” in the moments and environments where consideration occurs and help them recall the benefits of religious men and women throughout their journey.

Guiding Principles and approaches

The 2016-2021 Strategic Marketing Plan is designed to create awareness that young people continue to feel called to religious life, that educational debt is an obstacle to religious vocations, and that the problem of educational debt can be eradicated completely with \$100 million.

1. Establish brand position.

CULTURAL CATHOLICS

Tap into sentiment that wants to support religious vocations in the Church.

ACTIVE CATHOLICS

Create an easy and identifiable way to support religious vocations for the future by eliminating the hurdle of educational debt.

COMPETITIVE DONOR CAUSES

Carve out a collaborative role for the fund to help solve: Increase religious vocations via educational debt assistance.

OUTCOME

Continue the social ministries and spiritual work of the church and achieve the goal of increasing religious vocations by 10% in the U.S. by 2025.

2. Leverage existing assets and alliances.

Enlist the assistance of NFCRV board members, NFCRV grantees, and NRVC members to identify potential donors and ambassadors.

Extend the reach of the NRVC in its efforts to promote religious vocations. and support their NFCRV campaign.

3. Create a Brand Identity Campaign.

Among the broad Catholic market, establish the connection between the easily understood challenge of educational debt with its relatively unknown affect on religious vocations.

4. In a three-phase approach focus on major donors, mid-level donors, and then all donors to build awareness, engagement, and advocacy for the campaign.

The programs established within the plan will attract donors for the NFCRV as well as promote religious life for the benefit of the Church and the world.

Trends and Implications

Factored into the strategic framework for the national plan is the general Catholic population's understanding and awareness of Catholic religious vocations and the lives of religious sisters, brothers, and priests. The plan also considers giving behavior among Catholics. Some trends to be considered:

- **Less personal knowledge of religious men and women:**

With the movement of many religious men and women out of elementary and secondary education, Catholics who attend both Catholic and public school have fewer opportunities to meet men and women in religious life and witness their lifestyle and service to the Church. The plan will need to provided insight into the life and work of religious sisters, brothers, and priests.

- **Misconceptions about current vocation trends:** Many Catholics are surprised to learn that men and women continue to be interested in religious life. The successful promotion of the National Retirement Fund for Religious has played a role in the negative assumption that “all religious are dying out.” The plan will showcase the current uptick in interest in religious life as it is tracked by the NRVC, VISION Vocation Guide, CARA, and the USCCB.
- **Educational debt:** Educational debt is a unique to the U.S. and other countries that do not provide government funding for higher education. The issue of educational debt is concern for U.S. voters and may be addressed by government programs in the future. Because the issue is so relatable to the average U.S. citizen, there is an imperative

to reach donors with the challenge of educational debt as it relates to donors before people think that the “government will take care of it.”

- **Technology:** Evolving technologies are changing the way donors access information and make their giving decisions. Given these trends, it's critical to continue developing accessible and diverse content that can engage consumers in multiple ways.

Understanding the “new normal” of Catholic awareness and engagement with religious communities and the call to religious life will be essential to the success of the plan.

TREND		IMPLICATION	
PERCEPTION/IDENTITY	1	Research shows that Catholics across all targets have a positive image of religious sisters which also helps lift the image of men religious.	NFCRV's Strategic Plan will feature the stories of young women and men religious in its marketing across all platforms.
	2	Catholics are proud of the good work of religious communities, particularly in their prayer life and service to the poor.	NFCRV will showcase the impact of the work and witness of the 62k men and women religious.
	3	Most practicing Catholics have a positive image of consecrated life and are thankful for help or influence of a religious sister, brother, or priest.	NFCRV's messaging will illustrate the many connections people have to religious communities and individual sisters, brothers, and priests throughout their lives.

TREND			IMPLICATION
TECHNOLOGY	4	Diverse content is essential to current communication expectations and brand build..	NFCRV will engage consumers in the Brand Identity Campaign by developing multimedia content available across platforms and devices. Brand Identity Campaign will have its own web portal with links to the NFCRV site.
	5	Donor appeals and engagement increasingly comes via online campaigns.	NFCRV's Brand Identity Campaign will contain strategies and programming for capturing the attention and support of online donors.
DEMOGRAPHICS/BEHAVIOR	6	All generations will contribute to the growth of the Fund and support of religious vocations	NFCRV will test brand efforts among adult Catholics of all ages. The campaign's message will include new media to appeal to younger donors, and social networks for cross-generations engagement.
	7	In 2016 crowd-funding surpassed venture capital in fund-raising.	The Brand Identity Campaign will include a promotion designed for a crowdfunding response.
	8	Donors respond to appeals that tap into the deep-seated beliefs and good feelings they have for surrounding their faith and family.	NFCRV will engage donors and their friends and relatives via social networks in ways that will make them feel good about their faith and the work of men and women in religious life, so that become brand advocates and ambassadors.
	9	Catholic have historically supported devotions connected to shrines. And Catholic travel includes shrine visits.	As part of awareness build, NFCRV will establish a national shrine.
	10	Catholic religious giving most often is initiated at the parish level.	The Brand Identity Campaign will include parish-based programs and tactics, such as a annual collection for the campaign/fund.
	11	Celebrity engagement is an effective marketing tool, particularly in the current celebrity-driven culture.	NFCRV will research, vet, and invite a well known Catholic with an image that appeals to a wide array of Catholics to host an NFCRV event in hopes that they become an advocate and active donor of the Fund.
	12	Built-in analytics and metrics allow for detailed and deep tracking of user engagement	The campaign will include mechanisms for tracking response and continually refine strategies and tactics to ensure effectiveness.

Core Objectives

The NFCRV plan's strategic framework builds on the guiding principles and Catholic giving environment and focuses efforts on four key objectives and corresponding strategies:

1. **Approval and Funding** of the plan
2. Establish **brand identity**
3. Create **platform** for ongoing engagement
4. Expand **engagement** through publicity and lifecycle marketing

These objectives form the backbone of the 5-year Strategic Plan. The strategies were developed by integrating input and expert direction from the NFCRV director, the Executive Director of the NRVC, the NFCRV board and advisory committees, and the TrueQuest Communications Marketing team, which includes collaboration from Stubborn Wave Marketing.

TrueQuest used the latest research to track trends and implications that would optimize strategy development. The campaign will have a positive impact far beyond vocations for the Catholic Church in the U.S. While the primary focus will benefit NFCRV, the NRVC, religious communities, and the entire Catholic Church will be positively influenced by these efforts.

Objective 1: Approval and Funding (Pre-Plan Phase)

Finalize plan, receive NFCRV board approval, secure funding., begin pre-plan roll out

STRATEGIES

1. **Prepare preliminary promotional materials:** Brochure, Overview video for initial engagement with advisory groups.
2. **Board review:** Present 5-Year Strategic Plan proposal to NFCRV board for approval.
3. **Cooperative Marketing:** Work with Dr. Mary Ann McGrath in preparation of her Integrated Marketing Communications Incubator Challenge to generate ideas for from young marketers that may be included in the plan.

METRICS:

- Reactions and commitment from advisory groups and board
- Participation of Loyola students

Objective 2: Brand Identity (Phase I)

Establish brand identity and target large donors (100k and plus)

STRATEGIES

1. **Establish Brand Identity:** Deliver three creative campaign ideas for NFCRV board consideration. Final choice to be used on all engagement materials.
2. **Leverage NRVC connection:** Prepare resources/toolkit for NFCRV board, NRVC members for use promoting the Fund to their constituents.
3. **Initial outreach:** Attend NRVC Convocation and other gatherings TBD to introduce brand and enlist support from key partners/advisors. Conduct workshops.
4. **Bishops' endorsement:** Enlist the help of U.S. Bishops in regional asks and then national asks. Begin with appeal letter to bishops from religious orders (see list on p.18) to pilot collections in their dioceses.
5. **Identify key donors:** Prepare materials (e.g. customized brochure/video) and events (e.g., prayer breakfast) to engage key donors

METRICS:

- Awareness among key partners
- Engagement among NRVC members with leads for major donors
- Parish response
- Participation in and commitment from key donor events
- Donations

Objective 3: Platform (Phase II)

Create a platform funded by mid-level donors (10k plus) that drives ongoing giving among broad-based donors.

STRATEGIES

1. **Establish National Shrine:** Establish the National Vocation Shrine of Our Lady of Consecrated Life.
 - Choose Virgin icon from artist submissions
 - Determine and secure shrine site(s)
 - Develop devotional materials (e.g., prayer cards, medals, statues, rosaries)
 - Develop promotional materials (i.e., Direct mail appeal package; pilgrimages)
 - Announce shrine to the public
2. **Enlist national ambassadors:** Equip and commission advocates, ambassadors, influencers to engage a broader audience and promote awareness and support for consecrated life and the Fund. Deliverables include materials for parishes: posters, prayer & pledge cards.
3. **Create crowdfunding campaign** to enlist support of the Brand Identity Campaign

METRICS:

- Response to national roll out of shrine and direct mail appeals
- Participation of ambassadors
- Parish response
- Donations

Objective 4: Engagement (Phase III)

Build engagement and sustained giving through media relations, publicity, celebrity endorsement, regular communication, and market testing.

STRATEGIES

1. **Media relations/publicity:** Through media contacts publicize Brand Identity Campaign efforts. Pitch story ideas to local and national print and broadcast media outlets. Continue active social outreach.
2. **Celebrity Spokesperson(s):** Conduct research to determine most effective endorser(s). Negotiate contract with agents and secure endorser(s) to participate in NFCRV local/regional/national events.
3. **Publish quarterly newsletter:** to include:
 - Message from Executive Director
 - Fund updates
 - Candidate profiles
 - Features on religious communities and their works
 - Ways to support including monthly pledge subscriptions

METRICS:

- Media coverage/social engagement
- Promotion awareness
- Print run of print newsletter; views and clicks of electronic newsletter.
- Web traffic/social engagement
- Donations

Metrics

Because NFCRV is a start-up organization, the marketing plan places great importance on research and evaluation of various programs and efforts within the plan to measure success. The plan recommends third-party vendor evaluation of key efforts to gauge perception and effectiveness.

Annual Work Plans

The 2016-21 Strategic Plan creates a “road map” for NFCRV’s annual work plans over the next five years. We will take these objectives and strategies and attach tactics and budgets. Annual work plans will give permanent and contracted staff tactical guidelines on programs and metrics, incorporating refinements as the plan progresses year to year.

Annual work plans will address specific programs and precise budget line items, from advertising, promotions, publications, communications, and research. They will also include guidelines for measuring and evaluating effectiveness to determine program sustainability.

Strategic Plan Timeline

Mar 15, 2016	May 2016	Oct. 2016	May 2017	Oct. 2017	Jan. 2018	2019-21
Board green light	Choose brand identity from three creative submissions	Enlist NFCRV/NRVC ambassadors at NRVC convocation	Announce shrine and roll out promotion	Distribute parish materials for Vocations Awareness Week	Media engagement. Celebrity spokespersons hosted events scheduled	Measure, test, determine lifecycle marketing programs

The time intensive planning and execution needs of each phase of the plan will require work to be done in a non-chronological format given the particular parameters of specific deliverables. An example of this would be the development of the Shrine, a phase II initiative that will require work to begin in mid 2016.

Jan.-Mar. 2016	April 2016	Sept. 2016	Nov. 2016	Aug. 2017	Nov. 2017	Feb. 2018
Planning and Pre-Plan rollout. Brochure/videos	Loyola Incubator Program with young marketers	Host first prayer breakfast	Letter to U.S. Bishops from religious orders requesting collection	Distribute materials for ambassador/advocates	Crowdfunding launch for Christmas giving	Donor newsletter launch

A photograph of a circular architectural structure, likely a dome or a large atrium, featuring a spiral staircase and a central stained glass skylight. The skylight is composed of many small, colorful glass pieces in shades of blue, red, yellow, and green, arranged in a circular pattern. The staircase is made of concrete and has a polished, reflective surface. The overall atmosphere is warm and artistic.

3 Research & Analysis

2016

2017

2018

2019

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Tests across phases

The Brand Identity Campaign will spearhead qualitative and quantitative research with donor targets and analyze and provide recommendations on: messages, campaign integration, market and economic influences, consumer mindsets, competitive successes, opportunities, issues, and prospects

TEST		LEARN	
ANALYSIS	1 LISTS	➔	Ranking of lists by responsiveness and value
	2 TARGETS	➔	Which targets are most responsive overall and within lists.
	3 MESSAGES	➔	Which messages work best overall and within lists
	4 VALUE PER SEGMENTS	➔	Who are the large donors and repeat donors

Impact of religious vocations on society

Charisms (gifts) of Religious Communities

PRAYER | COMMUNITY | CATHOLIC IDENTITY | PERSONAL WITNESS & DEVOTION
SERVICE FOR THE SAKE OF GOD'S REIGN | EVANGELIZATION | RECONCILING PRESENCE

Ministries of Religious Communities

- Education (elementary, secondary and college level)
- Global missionary work: evangelization, relief, human rights, land & water rights, sustainable farming, environmental justice
- Catholic charities/social work: crisis centers, shelters, legal aid, at-risk youth
- Prayer/hospitality/spiritual direction/retreats
- Right to life
- Health and hospital services
- Nursing/elder care
- Parish ministry
- Religious education
- Young adult and campus ministry
- Peace and justice ministry
- Low-income housing/urban renewal
- Elimination of Human Trafficking
- Immigration/Migrant ministry
- Prison/anti-gang ministry
- Media and the arts

PATIENTS SERVED IN CATHOLIC HOSPITALS IN 2015	87.9 million
PERSONS SERVED BY CATHOLIC CHARITIES IN 2015	8.547 million
STUDENTS EDUCATED IN CATHOLIC SCHOOLS IN 2015	2.003 million

Active Church leaders from religious communities

Cardinals, Archbishops and Bishops from Religious (from USCCB.org)

Cardinal Seán P. O'Malley, O.F.M.Cap.

Archbishop of Boston

Honorary Chair of the NFCRV

Archbishop Roger L. Schwietz, O.M.I.

Archbishop of Anchorage

Bishop Michael C. Barber, S.J.

Bishop of Oakland

Bishop Francisco Gonzalez, S.F.

Auxiliary Bishop of Washington

Bishop Gregory J. Hartmayer, O.F.M.Conv.

Bishop of Savannah

Bishop Daniel R. Jenky, C.S.C.

Bishop of Peoria

Archbishop Joseph William Tobin, C.Ss.R.

Archbishop of Indianapolis

Bishop John Stowe, O.F.M.Conv.

Bishop of Lexington

Bishop Fernand Cheri, III, O.F.M.

Auxiliary Bishop of New Orleans

Bishop Dominic Carmon, S.V.D.

Auxiliary Bishop Emeritus of New Orleans

Bishop Edgar M. da Cunha, S.D.V.

Bishop of Fall River

Bishop David M. O'Connell, C.M.

Bishop of Trenton

Bishop George V. Murry, S.J.

Bishop of Youngstown

Archbishop Charles J. Chaput, O.F.M.Cap.

Archbishop of Philadelphia

Bishop J. Terry Steib, S.V.D.

Bishop of Memphis

Bishop Curtis J. Guillory, S.V.D.

Bishop of Beaumont

Bishop Plácido Rodríguez, C.M.F.

Bishop of Lubbock

Archbishop Gustavo García-Siller, M.Sp.S.

Archbishop of San Antonio

Bishop Eusebio L. Elizondo, M.Sp.S.

Auxiliary Bishop of Seattle

Bishop William P. Callahan, O.F.M.Conv.

Bishop of La Crosse



4 | Infrastructure and Execution

2016

2017

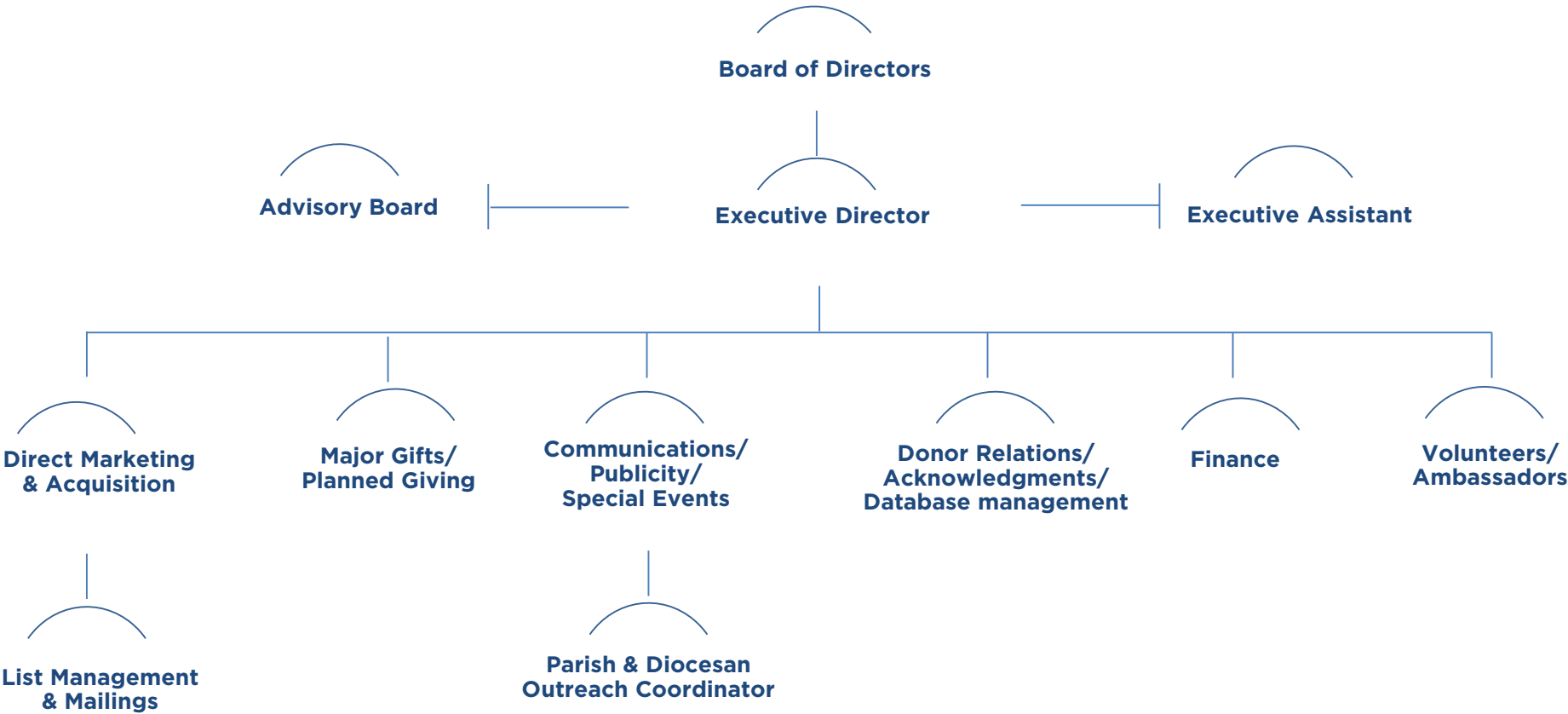
2018

2019

2020

2021

Infrastructure to support 5-year Strategic Plan



Staffing responsibilities will be contracted initially with the goal of a full transition to NFCRV.

Execution of Strategic Plan

Implementing the plan will involve thousands of business hours each year and require the input and participation from key NFCRV personnel across a broad spectrum of disciplines and areas of expertise.

Phase I

NFCRV BOARD approves plan. NFCRV DIRECTOR oversees implementation

Direct Marketing/Acquisition manages branding campaign, promotional materials for use with major donors, advertising, mailed and multimedia appeals. With Communications, ensures message consistency; develops special events; prepare appeal letter to religious order bishops requesting special collection for religious vocations.

COMMUNICATIONS manages online content and messaging, donor communications, spearheads publicity, with MARKETING and DONOR RELATIONS plans special events. Manages ongoing events.

DONOR RELATIONS with COMMUNICATIONS develops acknowledgment package. Ensures timely processing of gifts and special donor requests.

FINANCE establishes mechanisms for recording and processing donations coming through all channels and coordinating with DONOR RELATIONS.

MAJOR GIFTS/PLANNED GIVING with Advisory Board identifies prospects. Sets up meetings with donors and executive director.

Phase II

MAJOR GIFTS works to find underwriters of Shrine.

MARKETING/AQUISITION and COMMUNICATIONS announce the establishment of the Shrine. Prepare collateral for donors and media and appeal mailing to support the shrine.

DONOR RELATIONS manages acknowledgments and special requests.

ADVISORY BOARD helps Executive Director identify ambassador network to extend outreach and influence

COMMUNICATIONS and MARKETING develop package for parish outreach: National Day for support the education of religious men and women.

Phase III

COMMUNICATIONS develops 4-page donor newsletter. Works with ALL DEPARTMENTS to gather information, offer acknowledgments, promote continued giving.

MARKETING with COMMUNICATIONS implements broad-based acquisition effort.

MARKETING, FINANCE, DONOR RELATIONS: Aggressive testing to determine best messages and lists for all targets.

PHASE I: 2016-17 Establish brand identity and target large donors (100k and plus)	PHASE II: 2017-18 Create a platform funded by mid-level donors (10k plus) that drives ongoing giving among broad-based donors.	YEAR PHASE III: 2018-21 Build engagement and sustained giving through celebrity endorsement, regular communication, and market testing
DIRECT MARKETING/ACQUISITION manages Brand Identity Campaign, promotional materials for use with major donors, NRVC members, mailed and multimedia appeals. With COMMUNICATIONS, ensures message consistency; prepares appeal letter to religious order bishops requesting special collection for religious vocations.	MAJOR GIFTS works to find underwriters of Shrine.	COMMUNICATIONS increases media outreach and publicity efforts.
COMMUNICATIONS manages online content and messaging, donor communications, spearheads publicity, with MARKETING and DONOR RELATIONS plans special events. Manages ongoing events.	MARKETING/AQUISITION and COMMUNICATIONS announce the establishment of the Shrine. Prepare collateral for donors. Appeal mailing to support the shrine.	COMMUNICATIONS develops 4-page donor newsletter. Works with ALL DEPARTMENTS to gather information, offer acknowledgments, promote continued giving.
DONOR RELATIONS with COMMUNICATIONS develops acknowledgment packages. Ensures timely processing of gifts and special donor requests.	DONOR RELATIONS manages acknowledgments and special requests.	MARKETING with COMMUNICATIONS implements broad-based acquisition effort.
FINANCE establishes mechanisms for recording and processing donations coming through all channels and coordinating with DONOR RELATIONS.	ADVISORY BOARD helps Executive Director identify ambassador network to extend outreach and influence. With MARKETING AND COMMUNICATIONS begin process for celebrity hosts/endorsers.	MARKETING, FINANCE, DONOR RELATIONS: Aggressive testing to determine best messages and lists for all targets.
MAJOR GIFTS/ PLANNED GIVING with Advisory Board identifies prospects. Sets up meetings with donors and executive director.	COMMUNICATIONS and MARKETING develop package for parish outreach: National Day for support the education of religious men and women.	



5 | Budget

2016

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Fundraising goals

The 5-Year Strategic Plan has the ambitious goal of raising **\$100 million** over the next five years.

Phase I – 60%

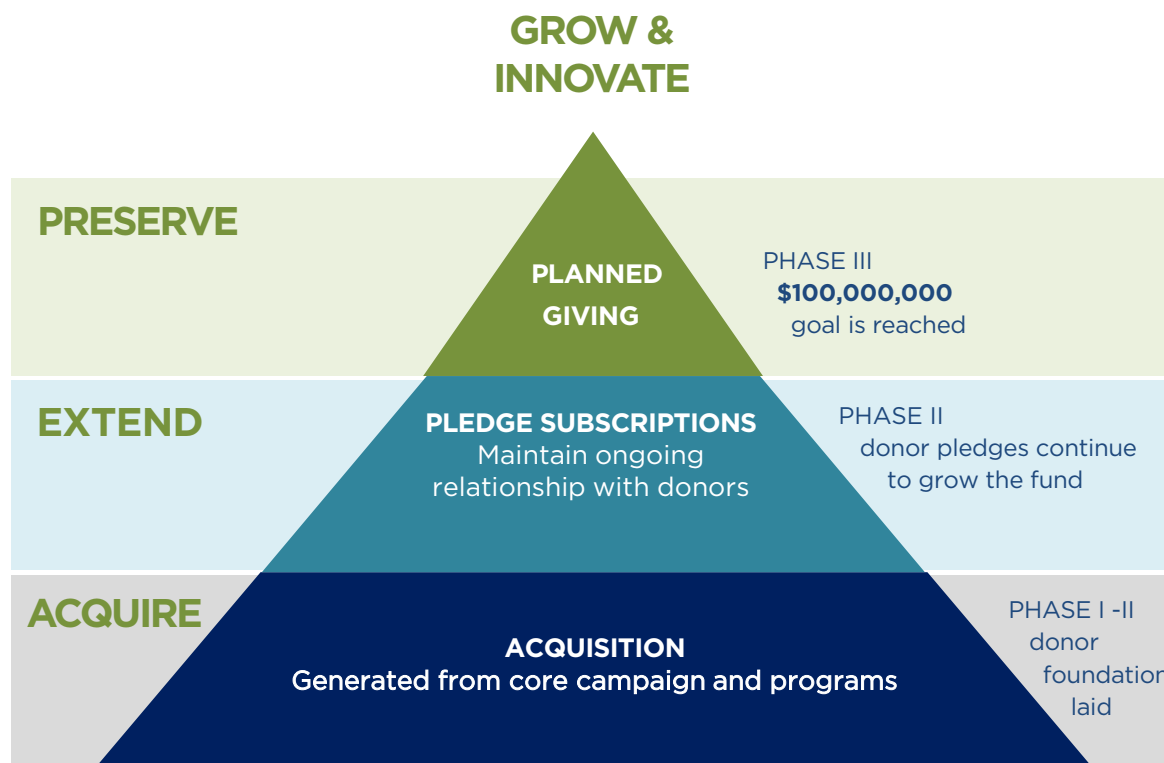
\$60 MILLION
 TARGET DONORS: \$500K +

Phase II – 15%

\$15 MILLION
 TARGET DONORS: \$10-\$50K

Phase III – 25%

\$25 MILLION
 TARGET DONORS: \$1-\$5K



QUICK LOOK

\$100,000,000 RAISED OVER THE NEXT 5 YEARS TO ERRADICATE THE OBSTACLE OF EDUCATIONAL DEBT TO RELIGIOUS LIFE
\$20,000 PER MONTH RETAINER REQUIRED TO BEGIN PLAN EXECUTION



6 | Campaign team leaders

2016

2017

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PATRICE TUOHY
CO-FOUNDER, CEO, PUBLISHER.



PHIL LOFTUS
CEO STUBBORN WAVE MARKETING.
MARKETING STRATEGY

TrueQuest Communications is a Chicago-based Catholic publisher and publishing services company serving the needs of the Catholic market through award-winning resources and outstanding marketing and communications services.

Principals Patrice Tuohy and Phil Loftus each have 30 plus years of experience in publishing, direct marketing, promotions, public relations, and communications for the Catholic and general consumer markets as well as Catholic parish and institutional fundraising.



7 | Moving forward

2016

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2021



Important considerations

College debt is a current, relatable, and easily understood issue for the average U.S. consumer and Catholic donor. That fact will assist in NFCRV in fundraising. However, new presidential leadership may move to solve the problem of educational debt through future government programs, which will hamper NFCRV efforts down the road.

An imperative is built into this opportunity for fundraising on behalf of U.S. communities and candidates to religious life.

Next steps

Discussion, feedback with NFCRV director and board by March 15, 2016.

Decision on when to move ahead by March 31, 2016.

And we're off!



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Appendix

2016 2017 2018 2019 2020 2021

A vocation deferred

The photo on page 30 of Sr. Irene Clare Duval, M.O.P., is one of countless stories of women and men who had to defer their vocations to religious life until they were able to pay off their student loans.

The NFCRV's mission is to enable religious communities to welcome new members without delay so that these young women and men may actively follow their call to serve God and others through consecrated life.

Sr. Irene Clare Duval, M.O.P. knew she wanted to be a nun since she was 8 years old, but it wasn't until she was 48 that she joined the Compassionate Franciscan Sisters of the Poor (formerly the Missionaries of the Poor, Sisters). During the four decades in between she served in the U.S. military, went to college, and worked for the New York City police department as a drug chemist.

Once she had finally paid off her college loans, Sr. Irene joined the Franciscan Sisters of the Poor. Two years later was sent to Haiti—her birthplace—to minister to a desperately poor community in the mountains of southern Haiti. The people of Viloux quite literally had nothing until she came.

Sr. Irene started a school feeding program that provides meals to 121 children, most of whom were going days without food before she arrived. She opened up the local government school to more children by hiring additional teachers and launched a dispensary, doling out medicine and care to families who had nowhere to turn when they got sick.

One thing Sr. Irene has learned over her life is the importance of prayer. She says it is especially helpful when she makes the trip from her home to Viloux each week to minister to the people. She takes the tap-tap—an overcrowded public bus—then walks the last hour-and-a-half through rocky roads winding up the mountains.

“Prayer is my lifeline,” she explained. “Over and over, I’ve seen how powerful prayer is.” Through her strong faith in God and rich life experiences Sr. Irene works diligently to help Haiti’s poor, despite the challenges.

*—Excerpted from Cross Catholic
Field blog*