

Administrative Presentation

St. Coletta Fall Family Conference
Saturday, October 2, 2010

 **Belonging**

Agenda

- Welcome & Introduction of Speakers
- Year in Review
 - Creative Partnerships
 - Campus Sale
 - Golf Course Re-development
 - Renovation of New Corporate Headquarters
- Human Resources
 - Recruitment & Retention Initiatives
 - Other employee initiatives
- Financial Perspective
- Development/Fundraising



Belonging

Creative Partnerships

- Golf Course re-development (2-year deal)
 - Community benefits
 - Impact to Clare Country Estates housing development and future land development.
- Campus Sale (6-year deal with option to purchase)
 - LLC between Sisters of St. Francis of Assisi and St. Coletta in partnership with developer.
 - Critical Factors
 - Timing
 - Condition of buildings
 - TIF implications
 - General Financing
 - Community enhancement
 - Timeline going forward

New Corporate Headquarters! We're Moving!

- Renovation Project Guidelines:
 - To promote a global St. Coletta Community and establish our corporate center.
 - To accommodate day programs (Excel/Golden Options) in functional updated space.
 - To underscore our commitment to our founding by the Sisters of St. Francis of Assisi and our Catholic Franciscan Tradition and Mission. (chapel space).
 - To maximize potential partnership possibilities
 - Space for community use
 - Rental options with other health and human service organizations.
- Timeline
 - Projected completion - January 2011
with occupancy as soon as possible.
 - A communication plan will be developed to help facilitate the move and keep families informed.
 - Monitor construction progress on the St. Coletta of Wisconsin Facebook page!

Human Resources

Organizational Turnover (calendar year)

35% against a goal of 25%. (national industry turnover = 39%)

DSP turnover at 38% (106 employees)

- Benefits
 - Increased DSP pay rate
 - Vision insurance, part-time medical plan.
 - Piloted Preceptor Program
 - Provided tuition assistance for 6 employees to continue post secondary education.
- Communication
 - Facilitated DSP input mechanisms
 - Implemented organization-wide suggestion boxes (physical/electronic)
 - Added monthly communication tools
 - Developed employee newsletter tied to employee intranet
 - Enhanced leadership visibility across program/service areas.
- Structure & Supports
 - Implemented (Care Triad) to support programs.
 - Leadership Training

Human Resources

Retention Initiatives (continued):

Employee Activities:

- Re-instituted outings – Chicago city tour/OSF Motherhouse.
- Held recognition event in conjunction with mission week. Celebrated an employee (Jackie Gess!) with a 40-year service award!



Human Resources

- Recruitment
 - Hires –127 employees (123DSP's)
 - Enhanced benefit package
 - Increased rate of pay for DSP's
 - Attended psychology classes at local high schools.
 - Partnered with local colleges (technical/universities)
 - Enhanced career page of website (testimonials, searchable by locations, fill-out to submittal on-line).



Belonging

Human Resources

Additional Initiatives:

- Health and Wellness
 - Smoke Free!
 - Organizational Committee
 - Good Health Makes Good Sense! - Health Fair on 9/8
- Future Focus:
 - Implement organization-wide employee opinion survey process
 - Implement recognition program
 - Continued enhancement to benefits
 - Health and wellness
 - Evaluate Preceptor Program for organization-wide use.
 - Provide ongoing leadership training

Financial Perspective

- Fiscal Year 2009/10 - operational:
 - Operated with annual donations and made no draws on foundation resources.
 - Reduced day-to-day costs i.e., supplies, equipment, OT
 - Transitioned out of a program that consistently ran a deficit (Alverno).
 - Achieved better than anticipated development revenue.
 - Achieved better than anticipated voc/day program revenue.
 - Negotiated some improved contracts with funding sources.

Financial Perspective

- What does the future hold?
 - Ongoing funding challenges
 - Status of Medicaid funding creates a “ripple” affect from federal to state level. We also anticipate additional cuts.
 - Illinois – Ongoing challenges to receive timely payments.
 - Managed Care (WI) – Nearly 70% of clients funded through this source. Will also be implemented in the next three years in IL!
 - Use of gifted revenue (development).
 - Decreased costs related to campus and through building consolidation .
 - Possible expansion
 - Property sales
 - Continue evaluation of resources to determine how they can best support the STC Mission.

Development Facts & Figures

- Annual giving is defined as funds raised annually to support the operating budget.
- Annual Giving Amount 2009-2010 \$2 . 8 Million! Exceeded annual giving 2009-2010 goal of \$805,000.
- Two significant and sustaining gifts from a family member positively impacted goal attainment.



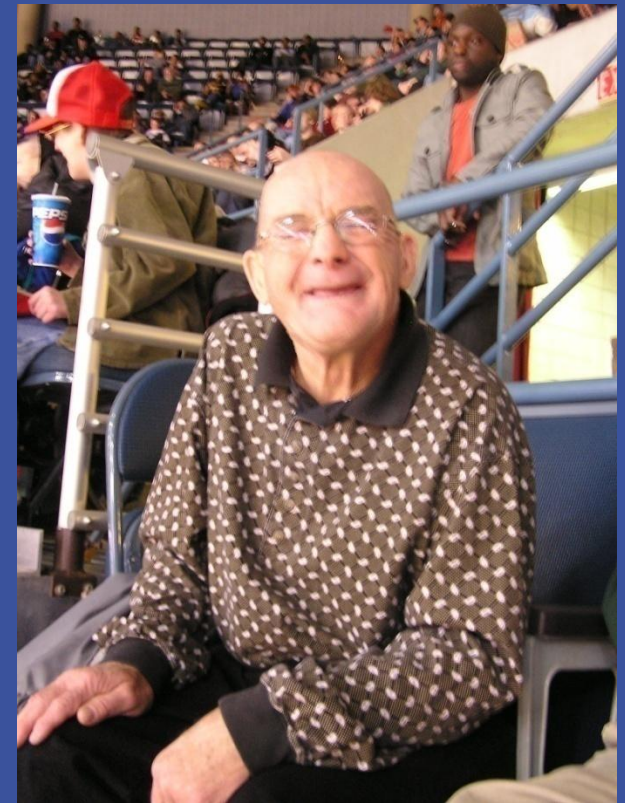
Donor Demographics 2009/10

- Number of donors: 1,726
- Top five states: Wisconsin, Illinois, Iowa, California and Maryland
- Number of states gifts received from: 37
- Average memorial gift: \$49.00
- Average legacy & bequest gift: \$34,550.00
- Average grant: \$5,500.00
- Average direct mail appeal gift: \$130.00
- Average special event donation or sponsorship: \$173.00
- Total average gift amount: \$510.00

Importance of Development

The shortfall between revenue and reimbursements per client annually:

<u>Budget Year</u>	<u>2009/10</u>
Average Revenue	\$50,508
NOTE: Does not include fundraising dollars.	
Average cost	\$56,456
Difference	\$5,948
Annual Subsidy	\$1,552,428



Going the Extra Mile

St. Coletta sibling, Karyn Odway, raised nearly \$5000 to assist with the Garden CILA Home renovation project.



- Used Facebook and her personal inspiration blog to share the St. Coletta story and the impact her brother Gary has had on her life.

Development Looking Forward

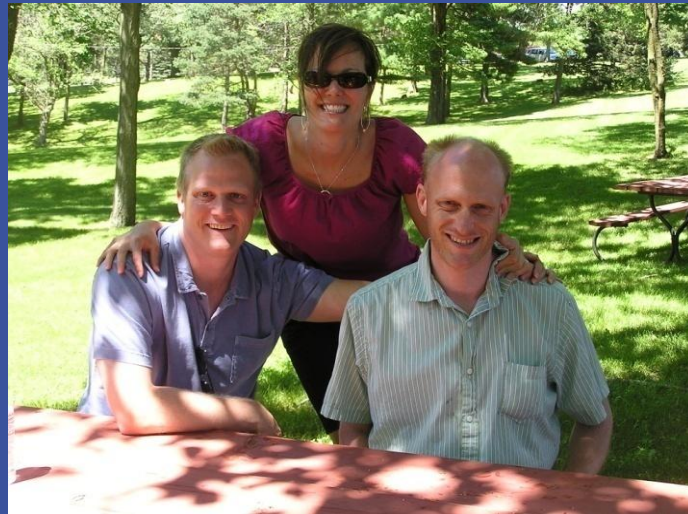
Challenges

- Aging of donor base, need to engage new and younger donors.
- Need to increase corporate and foundation support.
- Getting people involved:
 - Ambassadors telling our story!
 - To volunteer
 - To participate in special events.
 - To introduce people with new connections

Opportunities

- A compelling mission
- Committed family members!
- A strong fundraising foundation.
- All generations / diversify board members.
- Online giving/social media
- Partnerships with like minded organizations.

Questions?



“By building relations we create a source of love and personal pride and belonging that makes living in a chaotic world easier.”

Belonging