

Lakeshore Foundation

DRAFT Strategic Plan - 2025 - 2028



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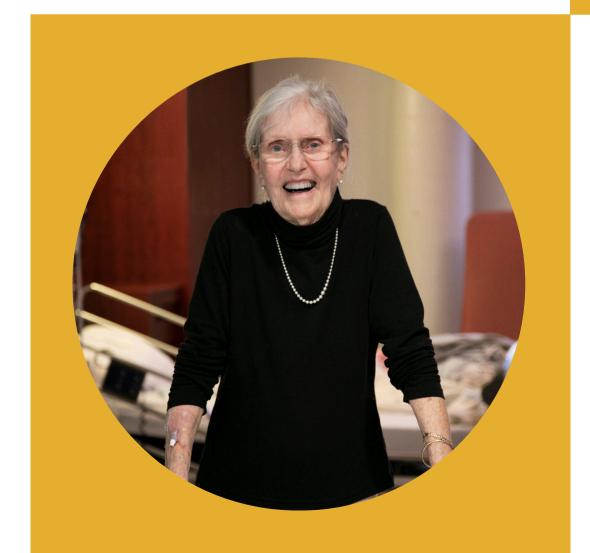
Mission Statement

To inspire, encourage and engage our community to invest in helping elevate the quality of healthcare at the Lakeshore General Hospital and improve the lives of all those who come through our doors.



Overview

To elevate the positioning of the Lakeshore General Hospital Foundation, in Montreal's non-profit landscape, by identifying key areas of focus.





The strategic plan will be organized around key themes, with each step interconnected and overlapping to ensure a cohesive approach.

Strategic Objectives 2025-2028



Increase

Annual Revenue

Build a Capital Campaign Continue engaging Team,
Board of Directors &
Committee members.

Recruit when needed

Continue building the Foundation's Financial Opportunities

Build a Planned Giving program Promote Hospital & Foundation
(Marketing & Communications)

Build Governance

Continue Building
Relationship with LGH &
CIUSSS



Goals

- 1. Continue building our stewardship program
- 2. Increase donor retention rate
- 3. Continue target email solicitation
- 4. Increase number of monthly donors
- 5. Create & execute recognition programs
- 6. Increase Partner Program
- 7. Increase event revenues
- 8. Expand on our major gifts program

Increase Annual Revenue



Continue building our stewardship program

Reasoning

Cultivates Long-Term Relationships

Strengthens Mission Alignment

Builds Donor Retention

Demonstrates Accountability and Transparency

Encourages Major and Legacy Gifts

Fosters a Community of Support

Enhances Reputation

Execution

Public or private acknowledgment

Regular engagements

Hosting events

Providing exclusive updates

2

Increase donor retention rate

Reasoning

Cost-Effectiveness

Ensures Financial Stability

Increases Giving Potential

Reduces Donor Fatigue

Execution

Analyse our donors by dissecting our data base

Establish a proper stewardship program

3

Continue target email solicitation

Reasoning

Maximize Fundraising
Efficiency

Tailored Messaging

Execution

Analyse our donors by dissecting our data base

Continue executing the patient & donor mailer

4

Increase number of monthly donors

Reasoning

Recurring revenue

Simpler for the donor

Forecast cashflow

Often results in increased giving than one-time donors

Execution

Target this audience with phoncalls, donorversary, birthday cards

End of year, request for an increase of \$5, \$10 or \$20 per month

5

Create & execute recognition progams

Reasoning

These programs showcase individuals who have shown an outstanding committment to the Foundation

Execution

Utilization of our database & stewardship program

Execute the recognition program that is targeted to each group

6

Increase Partner Program

Reasoning

Provides Financial Support throughout the year

Long-Term Stability

Builds Community Engagement

Builds Strategic Partnerships

Execution

Utilization of networking opportunities

Strategic Partnerships
Manager to analyse
program and continue the
process



Increase event revenues

Reasoning

Covers Operational Costs

Expands Donor Base

Increases Awareness and Visibility

Builds Community Engagement

Stimulates Long-Term
Support

Boosts Volunteer and Corporate Engagement

Execution

Keep engaging Committees

Bring down costs

Provide guests with new and exciting experiences

Increase sponsorships & Ticket purchases

8

Expand Major Gifts Program

Reasoning

80% of revenue comes from 20% of donors

Focus on Family Foundations

Execution

Foundation Search Software

Develop list of projects and cases for support

Set meetings, discuss with Board regarding closest contacts



Goal

To secure the long-term financial stability and sustainability

Build a Planned Giving Program 2025-2026

Build a Planned Giving Program

Reasoning

Ensures Long-Term Financial Stability

Diversifies Revenue Streams

Encourages Legacy Building

Leverages Tax Advantages for Donors

Strengthens Relationships with Professional Advisors

Prepares for Future Needs

Execution

Utilization of our database

Encourage all Board
members to leave a legacy
gift or take out an
insurance policy for the
Hospital

Promote other ways to give to the community and targeted audiences



Goal

To raise significant funds for a specific, large-scale project or initiative that advances the mission and strategic objectives of an organization.

Build & Execute a Capital Campaign

Build & Execute a Capital Campaign

Reasoning

Facility Upgrades and Expansion

Enhancing Patient Care
Services

Addressing Community Needs

Strengthening Competitive Positioning

Honoring the Hospital's Legacy

Execution

Engage Board of Directors
& Staff

Hire a Company to assist

Create a case for Support

Engage community, donors, Foundations and Corporate



Goals

Create marketing and communications strategies to increase awareness of the Lakeshore General Hospital and the Foundation

Promote Hospital & Foundation

Promote Hospital & Foundation

Reasoning

Enhances Community
Awareness

Attracts Financial Support

Creates a Sense of Pride

Execution

Create new signage

Explore new relationships with media

interviews, press releasing and invites to grand openings

Impact report all CIUSSS

Post on social media, e-blast, add to letters, website, etc...



Goals

- 1. Engage team
- 2. Increase Board to 20 members
- 3. Recruit Committee Members

Continue engaging Team, Board of Directors & Committee members



Engage Team

Reasoning

It will ensure varied points of view and discussion

Increases Productivity and Efficiency

Fosters Innovation and Creativity

Improves Collaboration and Teamwork

Encourages Personal and Professional Growth

Execution

Continue to coordinate regular meetings and communications

Continue to have open discussion

Invite to all events

Involve in recruitment of volunteers

2

Engage Board of Directors

Reasoning

To increase our fundraising capacity & our networking reach

To ensure varied points of view and discussion

Building a diverse skill set and networks

Execution

Identify outstanding participants through our events

Continue to coordinate regular meetings and communications

Brainstorming with existing
Board members &
Nominating Committee

Increase to 20 people

3

Recruit
Committee
Members

Reasoning

Increase Event Revenues

Increase awareness

Expand engagement

Execution

Engage Nominating Committee

Continue to coordinate regular meetings and communications

Engage Committee members to recruit



Goal

Develop Clear Policies and Procedures & comply with Legal and Regulatory Requirements.

Build Governance

Develop Clear
Policies and
Procedures &
Comply with
Legal and
Regulatory
Requirements

Reasoning

Ensures Consistency and Fairness

Enhances Accountability

Provides Legal and Regulatory Compliance

Improves Efficiency and Effectiveness

Promotes Ethical
Standards and Integrity

Enables Better Decision-Making

Execution

Create a Human Resources Policy document

Clear guidelines for employees, volunteers, and board members

Continue internal policies and procedures already in place



Goal

Ongoing reviews of the investment policy with committee & investment bank to explore Alternative Solutions and to understand the Foundation's Investment.

Continue building the Foundation's Financial Opportunities

Ongoing review of the investments

Reasoning

To model best practices

To have a sound and professional investment policy should donors request to see it.

To ensure that we are making the best and appropriate decisions with regards to our investments

Execution

Engage expert members of the committee

Continuously review alternative investment solutions

Execute investments



Goals

- 1. Continue building relationship with CEO
- 2. Continue meeting with all the Chiefs
- 3. Having transparency on project updates
- 4. Continue building relationship with auxiliary
- 5. Build a relationship with Santé Québec

Continue Building Relationship with LGH & CIUSSS

1

Continue to build relationship with CEO

Reasoning

Aligns Vision and Mission

Enhances Fundraising Success

Strengthens Donor Engagement

Ensures Long-Term Sustainability

Execution

Have regular meetings

Maintain regular contact

Invite to all Foundations events

2

Continue meeting with all the Medical Chiefs

Reasoning

Aligns Goals and Priorities

Improves Fundraising
Efforts

Drives Program Innovation and Development

Promotes
Interdepartmental
Collaboration

Execution

One-on-one meetings regarding projects

Invite to all Foundations events

Participate in the Table des Chefs meetings

3

Having transparency on project updates

Reasoning

Builds Trust with Stakeholders

Encourages Donor Confidence

Ensures Accountability

Addresses Challenges Proactively

Execution

Weekly contact with project managers

Follow up on ordering of items as well as delivery of items

4

Continue building relationship with Auxiliary

Reasoning

Expands Reach and Influence

Promotes Community
Advocacy

Demonstrates Unity and Strength

Execution

Regular meetings

Assist with requests to the Hospital

Engaging them in strategic Foundation projects

Invite to all Foundations events

5

Build a relationship with Santé Québec

Reasoning

Aligns with Government Priorities

Promotes Advocacy and Public Policy Influence

Encourages Long-Term Sustainability

Execution

Invite to all Foundations events

Reach out to key representatives at Santé Québec through formal introductions, emails, or meetings.

Attend conferences, forums, and events organized by Santé Québec to stay informed and engaged.

KPI's

Increase BOD to 20

18/20

Increase donor retention by 10%

36.26% last year 32.7%

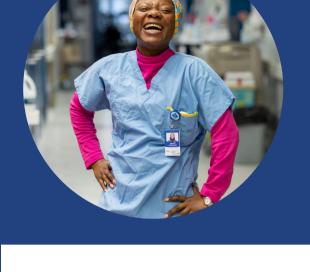
Increase event gross revenue & net revenue

2,300,000 gross

Increase revenue through the Capital Campaign

30 Million

Questions



Thank you!

