



Lakeshore Foundation

DRAFT Strategic Plan - 2025 - 2028

Presented to
Board of Directors
February 19th, 2025

Presented by
Nathalie Kamel

Items

03 Mission Statement

04 Overview

05 Strategic Objectives

06 Potential Tactics

28 KPI's

29 Questions

30 Thank You



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

Tactic

1

**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

Tactic

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

Tactic

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

Tactic

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

Tactic

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

Tactic

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

Tactic

7

**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

Tactic

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



Tactic

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

Tactic

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

Tactic

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

Tactic

1

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

Tactic

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

Tactic

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

Tactic

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

Tactic

**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

Tactic

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**

Tactic

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

Tactic

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

Tactic

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

Tactic

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!

