



**BUILDING A
FOUNDATION**
FOR THE FUTURE



A STRONGER FOUNDATION



For more than fifty years, The Royal has stood as a beacon of hope for many individuals grappling with mental health and substance use challenges. The Royal's journey, marked by groundbreaking discoveries and transformative care, has been fueled by the unwavering support of our donors and advocates. These committed supporters have played a crucial role in The Royal's achievements and continue to be essential at a time when the needs of the one in four individuals battling mental illness and substance use disorders have never been more pressing.

As The Royal embarks on a mission to accelerate new discoveries into more effective, personalized care, the Foundation renews its commitment to ensuring The Royal has the support it needs to close the mental health recovery gap with urgency and precision.

The Foundation's new strategic plan, "*Building a Foundation for the Future*," is a bold roadmap designed to elevate our fundraising efforts and set a new benchmark for philanthropic excellence. **Our focus is clear: to nurture a culture of philanthropy within our institution, to amplify The Royal's leadership role in mental health care and research, to enhance our fundraising prowess to ensure The Royal achieves its visionary goals, and to deepen our engagement with our community of supporters.**

The success of this plan hinges on the collective effort of our community of supporters. With our donors, volunteers, staff, clients, families, and healthcare professionals united behind this plan, we can help The Royal close the mental health recovery gap. **It is with profound gratitude that we invite you to join us on this transformative journey.**



CHRIS IDE
Foundation President



JANE DUCHSCHER
Foundation Board Chair

This is an opportune time for mental health causes, with mental illness and substance use disorders emerging as compelling health care issues that are drawing substantial attention from donors. When donors give to The Royal, they do so because they see their gift going beyond the hospital and breaking down barriers, eliminating stigma, fueling innovation, and effecting system change.

Now is the time for The Royal—the hospital, research institute, and Foundation—to assert its place as a leader in advancing mental health and substance use health care and embrace its position as a pioneer and recognized leader in research and discoveries. The Royal Ottawa Foundation for Mental Health’s (“Foundation”) strategic plan must support this ambition and foster a best-practice approach to philanthropy.

This plan embraces and leverages the Foundation’s existing strengths to further solidify its position and raise its profile and brand in the philanthropic marketplace. It will serve as a platform for the Foundation to build its overall fundraising capacity and programs. Underpinning the plan is a commitment to operational effectiveness as the Foundation is on a journey to become a best-practice, high-performance organization.

We have established four Strategic Goals that will guide our focus over the next three years, from April 1, 2024, to March 31, 2027. The goals are aspirational and will galvanize our staff, volunteers, donors, partners, and other stakeholders to actively engage in the Foundation’s Statement of Purpose and foster pride in The Royal. As well, we will pursue continued alignment and collaboration with the hospital and the research institute through information sharing and presenting transformative, impactful, and inspirational case projects to our donors.

STRATEGIC PLANNING PROCESS

The development of this strategic plan was a comprehensive and inclusive endeavor, engaging a wide array of Foundation stakeholders through a multifaceted consultative process.

We sought the perspective of staff and volunteer leaders from the hospital, research institute, and the Foundation, as well as our donors. Their valuable insights were gathered through a series of interviews, focus groups, online surveys, a dedicated session with the Foundation Board, and multiple discussions involving the Foundation staff team.

The consultation findings were enriched by extensive research into current trends in the philanthropic sector nationally, healthcare philanthropy, and the mental health and substance use health sector, with a specific focus on giving patterns in The Royal’s catchment area. The process was overseen and supported by the Foundation’s Strategy & Governance Committee in collaboration with senior staff.

CONSIDERING THE PHILANTHROPIC LANDSCAPE

As the Foundation charts its path forward, understanding the evolving philanthropic landscape is crucial.

This landscape is shaped by diverse factors, each presenting unique opportunities and challenges:



RIISING PROMINENCE OF MENTAL HEALTH AND SUBSTANCE USE HEALTH:

Mental health and substance use health care and research are gaining unprecedented focus. The heightened awareness presents a significant opportunity for The Royal and its work to be a philanthropic priority for more donors in our community and beyond.

Our strategy should rally donors around a compelling vision led by The Royal, making them feel integral to a movement dedicated to advancing mental health and substance use health care and research.



SHIFT FROM INSTITUTIONS TO BIG IDEAS:

Today's donors, especially major donors, are increasingly drawn to funding innovative, large-scale projects over traditional institutional support.

Our strategy should emphasize articulating a clear and inspiring vision, highlighting how investments in our organization lead to ground-breaking research and transformative health care practices. This shift demands that we present our work not just as a series of projects focused solely on improving care at The Royal, but as a cohesive, impactful vision for the future that has broad impact.





CHANGING NATURE OF DONOR RELATIONSHIPS:

Philanthropic relationships are becoming more focused, with fewer donors seeking deeper, more meaningful engagements. This trend is particularly evident among high-net-worth individuals and families, often involving significant intergenerational wealth transfers.

Our strategy should focus on genuinely and strategically engaging specific individuals and families with significant gift potential and a strong interest in mental health and/or substance use health. It is vital for the Foundation to establish key enablers of this, including a persuasive case, well-connected volunteers, and skilled staff.



INTENSIFIED COMPETITION IN PHILANTHROPY:

The philanthropic sector is highly competitive, underscoring the need for distinctive branding, a visionary case, and exemplary donor and volunteer experiences.

Our strategy should ensure that donors and volunteers, who are increasingly aware and discerning, receive a unique and exemplary experience with the Foundation. This involves clearly communicating The Royal's vision, its gratitude, and the impactful changes made possible by their support.



DIGITAL ENGAGEMENT AND DATA INTEGRITY:

The continuous advancement of digital technology has fundamentally changed the way charities engage with their supporters. This shift requires the implementation of effective digital communication strategies and stringent data integrity measures.

Our strategy should focus on integrating a data-driven and technology-forward approach to connect with and engage donors at all levels, ensuring the maintenance of accurate data and robust digital infrastructure.



INCREASED FOCUS ON SOCIAL JUSTICE AND EQUITY:

Donors, particularly younger generations, are increasingly attentive to issues of equity, inclusivity, and social justice.

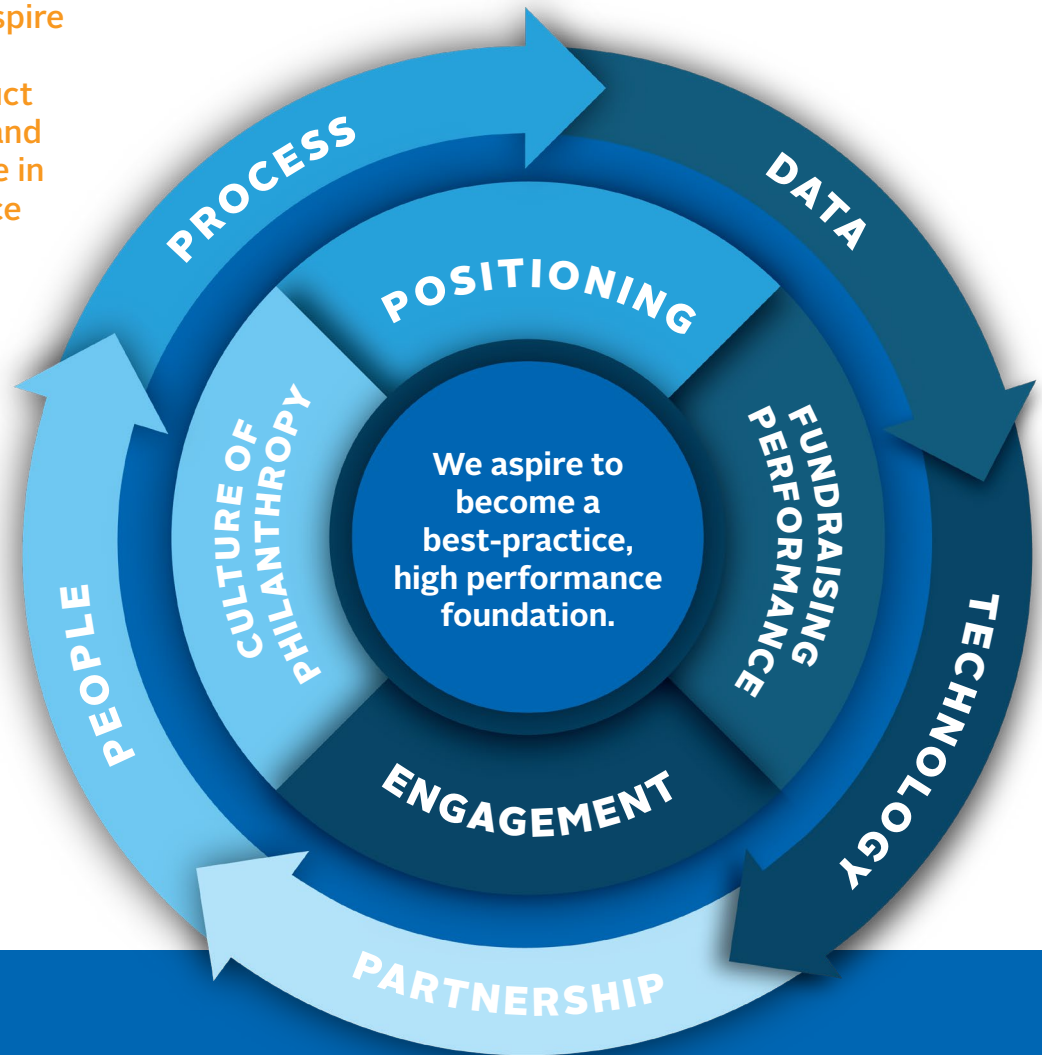
Our strategy should effectively present our philanthropic opportunities in mental health and substance use health care and research as vital for advancing equity, justice, and inclusion, highlighting their crucial role in the wider context of social inclusivity.

ROYAL OTTAWA FOUNDATION'S STATEMENT OF PURPOSE

We drive awareness and inspire philanthropic giving that enables The Royal to conduct ground-breaking research and provide transformative care in mental health and substance use health.

STRATEGIC PLAN FRAMEWORK

Our Aspiration, Strategic Goals, and Enablers



ENABLERS

To support these goals, we recognize the importance of the following strategic enablers:



PARTNERSHIP

Establishing strong, collaborative relationships with the hospital and research institute, characterized by open communication and cohesive goals as well as active participation in the execution of this plan, is vital to our success.



PEOPLE

Attracting talented individuals who excel in their roles and are passionate about our mission is critical.

01 CULTURE OF PHILANTHROPY

We will cultivate a strong internal philanthropic culture, inspiring generosity and support throughout The Royal.

02 POSITIONING

We will enhance The Royal's brand and boldly promote its leadership in mental health and substance use care and research.

03 FUNDRAISING PERFORMANCE

We will improve our fundraising capacity and outcomes to meet and support The Royal's ambitious goals.

04 ENGAGEMENT

We will foster deep stakeholder engagement keeping them informed of their impact and deeply committed to our work.



PROCESS

Streamlining operations with effective policies and procedures is vital to our efficiency.



DATA

High-quality, accurate data is the cornerstone of informed decision-making and process optimization.



TECHNOLOGY

Employing advanced systems and platforms is essential for enhancing our work, expanding our fundraising capacity, and effectively achieving our goals.

SUPPORTING OBJECTIVES & KEY PERFORMANCE INDICATORS

1

CULTURE OF PHILANTHROPY

People are at the heart of our strategic plan. This includes staff and volunteers of The Royal. We aim to build a culture of generosity within The Royal. **An organization-wide culture of philanthropy is a cornerstone of a resilient and robust fundraising program and one in which all members understand the transformative impact of giving and the essential role we all play in achieving fundraising success.** Advancing a strong internal culture of philanthropy at The Royal will inspire our donors and the broader community.

We seek to achieve this through the following key objectives:

Educate internal constituencies on the Foundation's role as a responsive and collaborative partner and the impact the Foundation and philanthropy have on the work of The Royal.

Inspire and empower key internal stakeholders to act as ambassadors and **promote a culture of philanthropy.**

Foster internal pride in giving and celebrate successes and achievements made possible through philanthropic support.

Build on our continued alignment with the hospital and research institute that includes senior staff and volunteer leadership of The Royal endorsing and communicating a compelling vision for philanthropy.

Advance the role of the Foundation Board as philanthropic volunteers.



KEY PERFORMANCE INDICATORS:

- Achieve 100% giving from all three boards.
- Achieve 100% giving from hospital senior leadership.
- Increase participation level by 10% in staff payroll giving.
- Increase hospital staff presence on fundraising committees from 25% to 100%.
- Feature staff supporters (donors, volunteers) in 12 communications annually.

2

POSITIONING

The Foundation has a growing reputation for enabling big, innovative ideas including world-class, leading-edge research that revolutionize care practices broadly. **We will build on our recent successes to strengthen The Royal's brand and boldly communicate its role as a leader in mental health and substance use health care and research.**

We seek to achieve this through the following key objectives:

Through compelling storytelling and integrated brand marketing, showcase how donations to The Royal catalyze significant mental health and substance use health advancements that have broad impact, **emphasizing philanthropy's crucial role in advancing health equity and justice.**

Implement a highly segmented and personalized donor communications strategy, **harnessing data-driven insights and emerging digital opportunities** for optimal engagement.

Equip volunteers, stakeholders, and staff with the tools and resources they need to independently **engage in ambassadorship**, effectively communicating The Royal's leadership, vision and opportunity for philanthropy.

Support the hospital and research institute's communications to ensure alignment with the Foundation's campaigns and The Royal's philanthropic priorities, **reinforcing a unified message and brand identity.**

KEY PERFORMANCE INDICATORS:

- Establish key brand attributes, benchmarks, and measure sentiments.
- Increase website visitors by 15%.
- Increase email newsletter subscribers by 5%.
- Develop and maintain 25 trained speakers (care, research, lived experience).
- Develop and disseminate 12 client impact stories annually.
- Achieve or surpass the industry average online donation conversion rate of 17%.



3

FUNDRAISING PERFORMANCE

The Royal, which is the only specialized mental health and substance use health care centre in the region, has a bold vision for research and care. To meet the hospital and research institute's growing philanthropic needs, we must enhance the Foundation's fundraising capacity and outcomes. **By executing strategic fundraising campaigns in support of the hospital and research institute's transformational ideas, building a robust and resilient donor community, and engaging fundraising volunteers effectively, we will drive transformative philanthropic success.**

We seek to achieve this through the following key objectives:

Ensure the success of the 'Hope Starts Here' campaign is a top priority for the Foundation and well supported by the hospital and research institute.

Leverage the campaign as a catalyst to build capacity within the Foundation as it continually strives to be a forward-thinking, best-practice enterprise.

Expand the donor base by growing support from individuals engaged in mass/participative giving, as well as from leadership and major gift donors.

Ensure alignment between the Foundation, hospital, and research institute regarding philanthropic priorities, and ensure that fundraising solicitations are consistently harmonized with these priorities.

Create transformative opportunities for philanthropic investment that will **inspire major gift donors.**

Provide fundraising volunteers with a productive and meaningful experience.



KEY PERFORMANCE INDICATORS:



- Achieve annual revenue goals.
- Increase number of unique donors by 5%.
- Achieve and maintain a donor acquisition rate of 10% or more (annually) each year.
- Increase number of community fundraisers by 70%.
- Achieve a fundraising volunteer net promoter score of 30 or more.

4

ENGAGEMENT

Effective fundraising is rooted in the cultivation of meaningful and authentic relationships.

We are committed to deepening the engagement of Foundation staff and board members while also enriching the experience of our donors. Doing so will solidify our donor base and create opportunities for its growth.

Our responsibility lies in keeping these stakeholders informed of their impact and actively engaged in our Statement of Purpose.

We seek to achieve this through the following key objectives:

Provide a meaningful, authentic stewardship experience for all donors that illustrates our gratitude and the impact of their giving.

Foster an environment that is focused on attracting and retaining top Foundation staff by being an employer of choice for fundraising professionals.

Create a productive and meaningful experience for Board members that includes involvement in governance, active fundraising, stewardship, and ambassadorship.

KEY PERFORMANCE INDICATORS:

Achieve a donor retention rate of 65% or more (annual fund).

Achieve a donor pledge fulfillment of 90%.

Achieve an employee net promoter score of 30 or more.

Achieve an employee retention rate of 80% or more.

Achieve an employee regretted attrition rate of 10% or less.

Establish benchmark and achieve a Foundation board member net promoter score of 30 or more.



WHAT'S TO COME

We believe in a world where mental health holds equal status and acceptance as physical health. We believe in a world free of stigma. We believe every individual deserves effective and personalized care that creates a path to wellness. We believe that this plan and our collective efforts will help get us there.



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