

Educational Symposium – “Common Threads”

Position Paper: Catholic School Advancement

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“Now, Catholic Educators Must Also Be Fund-Raisers” was the title of a featured article recently in the *The New York Times*. The article notes that “Catholic schools have suffered in part because of the slowness of leaders and laity alike to grasp enormous economic changes, especially for elementary schools tied to their parishes. Too many institutions and too many individuals have not acted on the new reality: Catholic schools will have to become expert fund-raisers to survive”.

Although it presents a stark reality, the message is clear – creative and sustainable solutions are required to ensure the viability and sustainability of our schools today.

At a time of increasingly higher demands on Catholic educators, a concerted effort at visioning, organizing, energizing and implementing will be paramount. Experience has shown that when Catholic school leaders (*Pastors, Presidents, Principals, Directors of Advancement/Development*) share a common vision in a consultative role with volunteer leaders (*Board of Trustees, Board of Directors, School Advisory Board, etc.*) – great things can happen.

Although varying solutions are available, it is imperative that Catholic school leaders today embrace “best practices” to provide proven solutions and sustainable results. In the area of advancement, the following is offered as a guideline of what questions to ask first and what approaches to consider thereafter:

- What are the differences between fundraising vs. development vs. advancement?
- Is our approach mission centered?
- How have we segmented our constituencies in order to tailor our message?
- Which approach will build and enhance lasting relationships?
- Do our efforts have short-term and limited \$\$ potential, or long-term and sustainable potential?
- What is the value of our effort for the time allocated?

The answers to these questions will clearly offer an indicator of which approach you are taking to ensure the viability and sustainability of your school. There are very few “fundraising” efforts today that are mission centered, build relationships, offer long-term and sustainable support, and provide great value for the time invested. The traditional Catholic model of raffle tickets, wrapping paper, candy bars, lottery calendars and magazine sales as “fundraising” have served a purpose in a by-gone era, but no longer meet today’s priorities. Our Catholic schools need to move beyond fundraising and embrace advancement as the proven solution if we are to sustain the gift of Catholic education for the generations to follow.

Where fundraising is rooted in “raising funds by any means” and development is rooted in “fund resource development”, advancement at its core is rooted in “advancing the mission” and what could be more important for Catholic schools? To do so we advocate organizing your effort along the Non-Revenue and the Revenue components of a comprehensive advancement program. Each component should be integrated with one another to engage and inspire our multiple constituencies to more fully partner in the mission of the school in order to achieve strategic objectives in a spirit of shared responsibility.

When done well the non-revenue components such as *advancement operations, communications, constituent relations, volunteer management, strategic planning, stewardship* and *research* will provide a catalyst for our schools to engage and inspire stakeholders at the highest level. The resulting value will be enhanced revenues to sustain your mission secured through an integrated approach of *enrollment management, special events, annual fund, major gifts, capital campaigns* and *planned giving*.

When we use the term advancement we are not talking just about fundraising. We are talking about a concept that includes not only the mechanics of fundraising but the mission, aims, programs and services of the school seeking support. The overall concept of advancement holds that the highest destiny of a school can be realized only when a compelling *mission* is experienced; a shared *vision* is established; and clearly articulated *priorities* are embraced by individuals willing to sacrifice and invest to ensure priorities become *realities*.

Advancement is a people process, an institution-wide concept. An effective advancement program involves the entire school and all its related constituencies including alumni, current parents, parents of alumni, grandparents, parishioners, students, faculty and staff, religious, diocesan leaders, foundations, businesses, friends and neighbors. An effective advancement program is coordinated and integrated across the institution and among its multiple constituents.

In its best form, advancement promotes and extends the school's mission, vision and priorities into transforming realities. Over the past two decades, all elements of advancement have become increasingly professionalized. Today university courses and degrees are offered in non-profit management, fundraising and advancement. Additionally, technological tools afford us the opportunity to access and utilize data in ways unheard of in years past; affording us the opportunity to know, engage and inspire our constituents and potential donors more than ever before.

These resources need to be embraced and championed by each of us in Catholic education. Because our constituents are also constituents of other charitable organizations, those organizations that effectively embrace certain guiding principles and then tailor their effort to convey in message and action the lessons of these principles will realize a higher degree of philanthropic support. So often, that higher degree of philanthropic support may come at the expense of organizations whose mission is more worthy, yet who are less organized and disciplined. Truly, a lesson to be learned!

Individuals of means choose to make charitable gifts because they believe in the mission, vision and priorities of your school. They see the mission as relevant for today, they believe the mission to be authentic, and they are compelled to take action by making a gift to reinforce what they believe.

Your school's mission is the most important building block for determining the direction of your school. Mission summarizes your school's purpose for existing and provides a primary reason donors choose to make charitable gifts. Mission is foundational – it speaks to the purpose of the school and who it seeks to serve.

YOUR Mission is also important because it differentiates you with clarity from other worthy causes. It is the pivotal reason charitable giving decisions are made by individuals and other entities which provide philanthropic support.

Increasingly, the element of institutional vision has become an equal partner toward inspiring commitment and action on the part of stakeholders, helping to fuel significant special gifts to support programs, projects and capital improvements. School vision rooted in the mission is the most powerful tool an advancement officer can have. Vision is a concept, an idea, a mental picture of what a school can and will become. It is vision that drives a school to achieve its highest destiny.

Your school's vision for the future gives life to your mission. In having a vision for your school, a concurring vision for advancement must also exist. The Advancement Counsel, in our work with Catholic schools across the country, advocates 13 key components of a school's comprehensive advancement program organized along "non revenue" and "revenue" components.

Components of a Comprehensive Catholic School Advancement Program

Non Revenue Components

Advancement Operations
Constituent Relations
Communications/Public Relations
Volunteer Management
Strategic Planning
Research
Stewardship

Revenue Components

Enrollment Management
Special Events
Annual Fund
Major Gifts
Capital Campaign
Planned Giving

Some positive examples do exist. Almost every Catholic secondary school in New England has a full-fledged advancement program. Close to 100 of the approximately 325 Catholic elementary schools in New England have advancement programs in place at their schools. Many of these schools have integrated their school advancement programs with their supporting parish advancement programs. Leaders of these programs hold the title of Director of School and Parish Advancement. The New England Association of Catholic Development Officers (NEACDO) is a wonderful resource for schools that are

just getting started in advancement with their offerings of conferences, mentoring program and a guest speaker's series on any of the components of an advancement program. Nationally, the National Catholic Educational Association (NCEA) provides a variety of resources to its member schools in the area of advancement both at the annual convention and at regional and national conferences.

If you are about to start an advancement program in your school and/or parish, consider these helpful hints:

- Hire the right person for the Director of Parish and School Advancement;
- Establish and equip an Advancement Office with all of the tools needed;
- Allocate the resources necessary to be successful (“you have to spend money to make money”);
- Allocate the time; develop a strategy and have a vision for the program;
- Don't be afraid of change/making decisions;
- Involve people in the process;
- Have the “long view” and take a step by step approach; and finally,
- Measure your results periodically, assess opportunities for improvement.

Five immediate priorities to maximize the return on your investment of time and resources:

1. Host a *visioning exercise* among limited, yet key stakeholders regarding Advancement 101
2. *Engage volunteers* in a strategic and meaningful way
3. Consolidate multiple sources into one *comprehensive database*
4. Establish a multi-constituent *Annual Fund*
5. Begin the process of school-wide *Strategic Planning*

Concluding thoughts:

In short, the challenges are great, the solutions vary, but the choices are clear. Advancement in its fullest sense of the word is a catalyst for change to help schools move with confidence beyond the realities of the present to the transforming opportunities of the future.

At the heart, it is accomplished only with a compelling *mission*, a shared *vision*, and articulated *priorities* that inspire confidence in the school's leadership, its goals and its aspirations for the future!

Credits: *The above reflections are offered with years of insight and experience influenced and messaged by individuals who also deserve to be recognized for their thoughts, implied or expressed, in this position paper: Jay Gould of The Advancement Counsel; Mark Seeberg of Seeberg Associates; Cal Stoney, Gonser, Gerber, Tinker and Stuhr; Br. Daniel Skala, Xaverian Brothers High School; and NCEA Notes.*

BASIC TRUTHS OF ADVANCEMENT

- Schools are not entitled to support, they must earn it.
- Successful advancement is not magic. It is hard work on the parts of people who are prepared.
- Advancement is not raising money – it is raising friends.

BASIC TRUTHS ABOUT ADVANCEMENT

- You do not raise money by begging. You raise it by engaging people in your school's mission.
- People do not just reach for their checkbooks. They have to be asked.
- Don't wait for the "right" moment to ask – ask now.
- Successful advancement officers do not only ask for money. They engage volunteers and organizational leadership in the mission of their school.
- You can't decide to raise money today and ask for it tomorrow. It takes time, patience and planning.
- Treat prospects and donors as you would customers in a business.

Components of a Comprehensive Catholic School Advancement Program

NON REVENUE:

- **Advancement Operations** – Effectively the backbone of the fund raising enterprise at any school that facilitates fund raising, gift processing, database management, fund management and stewardship.
- **Constituent Relations** - A program that involves and engages multiple constituencies more actively in the life and mission of your school via educational, social, networking, spiritual, family and on-line type programming.
- **Communications** – A strategic effort at messaging your school’s mission and vision via internal and external efforts such as magazines, web, marketing materials, annual reports, communiqués and the like.
- **Volunteer Management** – A program that involves engaging your school constituents in volunteer activities and includes job descriptions, recruitment, screening and interviewing, orientation and training, supervision and recognition.
- **Strategic Planning** - A planning process that usually includes formal statements that outline vision, mission, values, and key priorities for the medium to long term, and set out strategies for achieving goals and defined objectives.
- **Prospect Research** – The continuing search by Advancement offices for new and pertinent information concerning prospects already on record and for identification of individuals, foundations, corporations, etc., not yet listed, utilizing numerous reference sources.
- **Stewardship** – The policy and practice of recognizing gifts, first through immediate acknowledgment by card or letter, and subsequently through personalized notes, personal expressions of appreciation directly to donors, published lists of contributors, and in other appropriate ways.

REVENUE:

- **Enrollment Management** – A strategic effort at moving prospective students from a distance via general marketing and target marketing initiatives through the process of recruitment, application, acceptance, enrollment and retention strategies.
- **Special Events** – Vehicles such as golf tournaments, auctions and dinner dances which will foster greater constituent involvement in terms of time, talent and financial resources and designed specifically to build community, raise money, celebrate the school’s mission, and strategically cultivate prospects.
- **Annual Fund** – Any organized effort by a school to secure gifts on an annual basis, either by mail, phone, on line or through personal solicitation from all of its constituents.
- **Major Gifts** – A program to secure targeted gifts for a particular purpose in the amount of \$10,000+ toward a strategic objective proposed by the faculty and staff, approved by the administration and endorsed by the Board on an annual basis.
- **Capital Campaign** – A campaign to raise substantial funds for a nonprofit organization to finance major building projects, to supplement endowment funds and to meet other needs demanding extensive outlays of capital.
- **Planned Giving** – Any charitable gift that is planned – usually with professional help – to optimize a donor’s financial, tax, and estate plans while helping to secure the long-term financial strength of one or more charities

Catholic School Advancement Priorities over the Next Several Years

1. Schools must be exceptionally successful in advancement during the next ten years as the “great transfer of wealth” occurs and before those opportunities decline.
2. The Advancement Office will be responsible for ever higher fundraising goals reached through greater, larger, and more complex gifts.
3. Schools will need to deliver strong, consistent messages to solidify and promote Catholic, institutional identity and invest in a marketing effort to attract friends, funds and freshman.
4. The Advancement Office will house all functions related to external relations.
5. Success in fundraising will require greater segmentation and personalization.
6. The Advancement Office will be more heavily staffed with “field” personnel focused on facilitating regular contact with current and potential benefactors.
7. Strategic planning as the foundation for fundraising efforts will grow in significance.
8. The Advancement Office will be the catalyst for planning and will actually drive the strategic planning process.
9. The functions of the Advancement Office will require increasingly sophisticated and specialized support.
10. The Advancement Office will outsource many “non-contact” responsibilities like research, tuition management, graphic designing, mailings, etc.

So...

THE ADVANCEMENT OFFICE OF THE FUTURE

From a Program Standpoint – Advancement, Admissions, Communications, Constituent Relations, Strategic and Facilities Planning

From an Advancement Staffing Standpoint – A team very skilled in interpersonal relations, planning, prospect-centered management, research, technology

From a Budgetary Standpoint – Expanded to include a broader scope of responsibilities yet with particular attention paid to the cost to dollar raised.