

Diocese of Erie – Office of Catholic Schools
“Advancing the Mission: A Call to Lead”
Successfully Moving Catholic Schools into the Future

Advancement Program Workshop Schedule

Workshop #1 – Friday, August 3, 2007

Advancing the Mission of Catholic Education in the Diocese of Erie

Focused on the components highlighted below, The Advancement Counsel, together with the Office of Catholic Education, will host this one-day workshop for pastors, principals, directors of advance and volunteer leaders on organizing, prioritizing and maximizing efforts in a school advance program. We will explore the core components of a comprehensive advancement program and delve into key strategies to better position each school with the tools for new found success in the non-revenue and revenue aspects of advancement.

In each area, we will explore straightforward proven strategies that can better position each school with opportunities to take their advancement program to the next level. Recognizing the nature and unique challenges facing schools, it is our hope for an interactive workshop designed for sharing, collaboration and goal setting, both individually and collectively. This workshop will be conducted under the backdrop of "mission" and the emerging importance of lay leadership in our schools today. We hope to outline creative ways to identify, engage and inspire lay leaders who embody the Catholic tradition that permeates our schools and embrace the unique challenges we face.

One overriding expectation for this workshop would be to provide practical, detailed, proven and realistic strategies that can have an immediate impact upon the schools. We will spend focused time examining each component of advancement and collectively outlining methods to advance the mission of our schools and maximize the philanthropic results that can be achieved.

<u>Non-Revenue</u>	<u>Revenue</u>
Advancement Operations	Enrollment Management
Constituent Relations	Special Events
Communications	Annual Fund
Volunteer Management	Major Gifts
Strategic Planning	Capital Campaign
Stewardship	Planned Giving
Research	

Workshop #2 – Thursday, September 13, 2007

Developing an Enrollment Management Program

This workshop will focus on the school's enrollment management program – 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.

Workshop #2 – Thursday, September 13, 2007, continued . . .

Setting up an Advancement Office

This workshop will focus on setting up an “advancement office”. We will offer insight into creating an advancement program database of constituents – alumni, parents, grandparents, parents of alumni, parishioners, faculty and friends. Suggestions will be made on the purchase of a fundraising software package. We will assist in the configuration of the software – defining tables, setting up the correct gift funds and appeal codes, etc. We will offer advice on how to find alumni – starting with school records/transcripts, contacting the parents of graduates and recommending online alumni networking resources. We will train the advancement team in best practices for database management and embracing our motto of “information is power” and “data drives strategy”. Office protocol will be recommended, signage developed and the advancement program visibility raised to new heights.

Registration deadline, for the September 13, 2007 Workshop, is September 3, 2007.

If you are interested in coming, please notify Cathedral Center School, 452-4276 or the Rectory Office, 453-6677, ext. 8 as soon as possible. You may find your interest and skills better suited to a later session. Each workshop is led by Larry Furey of the national office of Advancement Counsel and by our own Chris Hagerty.

Workshop #3, Thursday, October 4, 2007

Creating a Volunteer Leadership Program

This workshop will review existing volunteer leadership opportunities both within the parish/school and the advancement program in order to provide assistance in establishing a good organizational model. This effort will ensure that the existing talent and leadership available - both on the staff and from volunteer groups - are organized into the most effective team possible, while involving more people in the life of the parish and the school. We will provide detailed recommendations on committees, structure, roles and responsibilities, and volunteer recruitment. This approach will sustain existing talents, maximize accountability, avoid burnout, and assist in achieving long-term goals.

Enhancement of Your Annual Fund Program

This workshop will also focus on the Annual Fund. We will provide proven steps to start and grow an annual fund program. Strategies will be developed for overall annual fund management and segmentation, leadership committee recruitment and structure, parent class captain program, alumni class agent program, direct mail, phonathons, reunion giving, matching gifts, and personal solicitations. Examples will be provided of an annual fund leadership manual and information on leadership training of an Annual Fund Leadership Committee.

Workshop #4, Thursday, November 8, 2007

Design of a School Communications Plan

This workshop will review any and all existing communication methods (constituent magazine, annual report of gifts, brochures, parish bulletin, etc.) and help prepare a communications plan for consistent and comprehensive relationships with all constituencies. Strategies and programs will be suggested for strengthening overall visibility and credibility among your primary and secondary constituencies through your programs of public relations, publicity, publications and research.

Workshop #5, Thursday, January 10, 2008

Guidelines for Special Events

This workshop will provide the participants with direction on existing special events, fundraising and non-fundraising, with the intent of maintaining a cohesive community while also avoiding volunteer and constituent burnout. These guidelines will address the who, what, when, where, why, and how of hosting special that raise funds, build community, share your vision, and position prospects for enhanced and sustainable support.

Establishment of a Major Gift and Planned Giving Program

This workshop will explain the major gifts and planned gifts and we will work with the participants to develop an ongoing program to build resources through major gifts and planned gifts at the parish and school levels - one that would compliment their existing or new advancement program for many years to come.

Workshop #6, Thursday, March 13, 2008

Design of an Alumni and Constituent Relations Program

This workshop will analyze, evaluate and suggest ways to strengthen the school's relationship with their alumni and participants will prepare a plan to involve more alumni in the life of their school. This effort will focus on the formation or enhancement of any existing alumni association, class agent program, class and school-wide reunions, and homecoming, locating lost alumni, alumni communiques and other alumni programs, all in order to advance the long-term interest of alumni in the life of their school.

Design of Current Parent and Grandparent Programs

The workshop will also analyze, evaluate and suggest ways to strengthen parent and grandparent relationships. Recognizing that parents and grandparents form the basis of volunteer and financial support for a school, we will advise on the best ways to create an environment for involvement and investment.

Workshop #7, Thursday, May 8, 2008

Creating Advancement Plan

This final workshop will not only serve as a review of the first five sessions but will also lay the foundation for the school's advancement program going forward. Each of the participants will be asked to present their advancement plan for the 2007/2008 school year to the faculty and other participants.

Enhance Business and Community Involvement

This workshop will advise the participants on programs for various key publics: friends, the business community, foundations, vendors and others - to yield greater understanding and increased financial support.

Budget and Volunteer Management Guidelines

The workshop will also offer recommendations on an advance office budget, staffing and volunteer model for ongoing advancement operations. These recommendations will also offer insight into job descriptions, training and ongoing professional development. Finally, the workshop will advise on the records and reporting system, donor recognition, and prospect identification and research.

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