

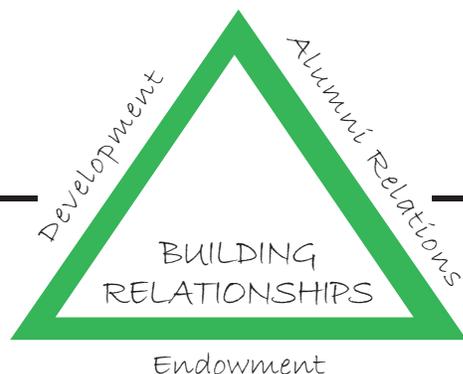
Advancement Services

Sponsored by the Office of Stewardship & Development

Administered through the Office of Catholic Schools

Staffed by Foley Consulting, Inc.

November 2008



Tip of the Month

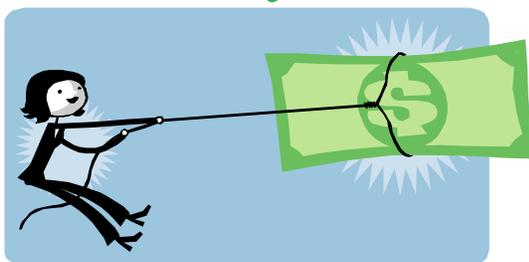
If your appeal is planned for later in November or early December, take some time RIGHT NOW to call your upper-level donors and thank them for supporting you last year. (Of course, if you have sufficient staff and volunteers to call every donor, that's even better!) Don't mention the upcoming appeal; just express your gratitude, indicate how their support was helpful and ask if there is anything your school can do for them at this time.

This is a great way to influence response to your next request and, quite frankly, it's good manners. In fund raising, the Rule of 7 means that each donor should be thanked in seven ways to continually reinforce the positive experience of giving to your school. If seven is too many to undertake, just think of one other option besides the obligatory thank you note...perhaps some thank you calls as described above?

7

Bailout Benefits!

When the bailout bill was recently passed, it included an extension of the legislation that provided many of our parishes and schools with wonderfully generous and, often, unexpected gifts. Each parish has received a sample flyer to alert donors that this opportunity is once again available. Here's the text for you to incorporate into your upcoming appeals, publications, emails, etc.



- ⇒ This distribution counts toward your required minimum distribution (RMD) for the current tax year.
- ⇒ The funds distributed are never included in your adjusted gross income. The distribution goes to your school/parish tax-free.
- ⇒ Even taxpayers who don't itemize their deductions enjoy tax benefits from giving under this new law.

IRA CHARITABLE ROLLOVER RETURNS!

For a limited time donors, age 70½ or over, can make charitable gifts directly from their IRAs. This popular giving vehicle is back for a limited time.

Congress recently passed a new law that revives a powerful giving opportunity allowing donors to make an immediate impact at your school/parish.

- ⇒ Authorize a qualified charitable distribution directly from your IRA of any amount up to \$100,000 in 2008.

Time is of the essence.

These charitable IRA distributions often take some time to set in motion, so act soon.

Please call the Archdiocese's Office of Planned Giving at 312/655-7848 for answers, information and assistance.

For more information go to www.parishgift.org.

The **Advancement Services Newsletter** should be distributed to staff, volunteers and board members involved in your institutional advancement efforts. Please copy and forward as necessary. If you would like to submit a question to our Q & A column, post a position announcement or arrange for others to receive this newsletter, please contact foleymaryj@aol.com.

Thank you!
Mary J. Foley, Director

ADC Registration

RSVP TODAY!

Email
fieweger@comcast.net
to reserve your spot for
The Art and Science of
Personal Solicitation
on Wednesday,
November 5.
See attached
ADC flyer for details.

There's been a wee bit of confusion about the ADC registration this year. Please bear with us as we incorporate new technology to make this process easier. To register, you need each member of your staff, committee, board, etc., to go to <http://spreadsheets.google.com/viewform?key=phAX2FBrCp9k0iatQ-hePBw>.

This will take less than one minute to complete.

The membership fee is \$75/school, but you may register as many individuals as you like.

Checks should be made payable to ADC and sent to:

*Ann Mommsen
c/o Notre Dame
High School
1655 W. Dempster St.
Niles, IL 60714*

Question & Answer



Q: Given the current market issues, shouldn't we hold off on the appeal we planned to launch this fall?

A: Absolutely not! Now more than ever we need to remind ALL members of our school family how essential their support is for the enormously important mission and ministry of Catholic education! With only two months left in the tax year, ALL schools should be making at least one (more) effort to invite parents, past parents, alumni, friends, faculty, staff, parishioners and businesses to give. Our donors recognize the value of what our schools provide as well as the need for ongoing contributions. If you don't ask them to include you in their charitable giving arrangements this year, someone else will and that's where the money will go.

*Move forward with courage and confidence! And if the asking aspect is what's making you hesitate, join the Archdiocesan Development Council on November 5 for a superb presentation on **The Art and Science of Personal Solicitation**. This program will be followed by a series of role playing demonstrations with opportunities for you to try out your pitch and see how to make it even better. See the attached flyer for more details.*

Q: I attended a recent presentation on Student Recruitment strategies and wonder if you could repeat the list of suggestions. It would be very helpful to look at all these options and see which ones we currently have in place. Thanks!



A: Here you go!

RESEARCH

- ♦ SWOT Analysis
- ♦ Self-Evaluation
- ♦ Surveys
- ♦ Walk-Through
- ♦ External Observers
- ♦ Focus Groups
- ♦ Event Evaluations
- ♦ Admissions Tracking
- ♦ Current Activity Results
- ♦ Other

STRATEGIES

- ♦ Advertising
- ♦ Baptism Follow-Up
- ♦ Blast Communication
- ♦ Buddy Family System
- ♦ Camps, Pre Pre-K
- ♦ Catholic Schools Week
- ♦ Class Masses
- ♦ Communications Audit

- ♦ Customer Service
- ♦ Direct Mail Acquisition
- ♦ Email Blasts
- ♦ Famous Alumni/Students
- ♦ History of Note
- ♦ Interest Area Follow-Up
- ♦ Non-School Parishes
- ♦ Open Houses, Tours, Visits
- ♦ Parent Programming
- ♦ Parking Lot Brigade
- ♦ Pastries with...
- ♦ Phone Tree/Telemarketing
- ♦ RE Strategies
- ♦ Referral Programs/ Incentives
- ♦ Signage
- ♦ Speakers Bureau
- ♦ School Sunday/Presence
- ♦ Student Ambassadors
- ♦ Student Programming
- ♦ Testimonials

- ♦ Track Record
- ♦ Unique Characteristics
- ♦ Website

SAMPLE OBJECTIVES

- (Examples are available for each of the following. Email yquiroz@archchicago.org to obtain a copy)*
- ♦ Inquiry Packet
 - ♦ Personal Contact Plan
 - ♦ Media Relations
 - ♦ Parish Bulletin
 - ♦ Direct Mail
 - ♦ Direct Mail Acquisition
 - ♦ Website
 - ♦ Newsletter

Archdiocesan Development Council
presents
The Art and Science of Personal Solicitation
Wednesday, November 5, 2008

Making the Ask. Now, more than ever, personal solicitation must be an integral part of your development effort. Join us and learn the how-to of soliciting from the first gift to the last and all those in between. Whether you plan to pursue annual fund, capital or dual asks, our speakers will provide you with invaluable skills.

Betsy Hughes Zimblar has been a fundraising professional for more than 25 years. For the last four years she has held the position of Vice President, Institutional Advancement for Illinois Institute of Technology in Chicago. Betsy's team has raised more than \$100 million in that time.

Bill Acton has 22 years of hands-on experience in organizational advancement and capital campaign management. Since 1993 Bill has worked as a consultant with Advancement Partners and has engaged in over 4,000 major gift solicitation calls ranging from \$5,000 to \$10,000,000.

Following the key-note presentation, ADC members will demonstrate solicitation visits and role play scenarios likely to emerge when making the ask.

SCHEDULE

9:00 – 9:30 Arrival, Hospitality, Networking
9:30 – 11:00 Keynote Presentation
11:00 – 11:15 Q&A
11:30 – 12:15 Solicitation Demonstrations/
 Role Playing

If you would like to practice your personal solicitation skills during the role playing session, or suggest a specific scenario, please indicate this when you RSVP no later than October 29, 2008.

LOCATION

Dominican University, Priory Campus, 7200 W. Division Street, River Forest

The Priory Campus is located one block west of Harlem on Division (enter off of Division). Parking is available near the building and in the lots on either side of the driveway as you enter from Division. Lost? The Priory Campus telephone is 708-714-9001.

RSVP

by October 29, 2008 to Liz Fieweger, Queen of Angels School, at fieweger@comcast.net.

Name: _____

School: _____

Email: _____

Phone: _____

If your school has not yet sent in its \$75 ADC annual registration fee, you may bring it to this meeting. Please make checks payable to Archdiocesan Development Council.

For more information about ADC membership, program details, etc., please call Molly Broeren at St. Angela School, 773-261-4400.