



DIOCESE OF CHARLOTTE  
CATHOLIC SCHOOLS



Enhancing Major Gift Programs  
for Catholic Schools

October 4, 2022

Ben Hoke

*Director of Development for Catholic Schools*

# About Me

- Diocese of Charlotte Catholic Schools – 1 year
- Non-Profit Consultant – 3 years
- Independent Schools – 22 years / 6 Schools
- Strategic Communications – Westminster College (UT)
- Political Science – Davidson College (NC)
- Traveled to 48 States
- Lived in 14 cities
- Charlotte, NC - Katherine and Millie (age 4)

# About Diocese of Charlotte Catholic Schools

- 20 Schools (92 Parishes)
  - 9 MACS (Mecklenburg Area Catholic Schools)
  - 11 additional (3 in Winston-Salem, 3 in Greensboro, 3 near Asheville, Gastonia, Salisbury)
- (4) High Schools, (1) Middle School, (11) K-8, and (4) K-5
- Student Enrollment – 7,500
- Faculty – 700 teachers / Staff – 250
- Oldest 1882 / Newest 2013
  
- Endowments - Foundation manages 91 School Endowments / Totaling \$14.1m



# DIOCESE OF CHARLOTTE CATHOLIC SCHOOLS



CATHOLIC SCHOOLS OFFICE

1123 S. Church St., Charlotte, NC 28203

nccatholicschools.org

704.370.6299

## ASHEVILLE CATHOLIC SCHOOL

City: Asheville  
Mascot: Panther  
ashevill catholic.org  
828.252.7896



## HOLY TRINITY CATHOLIC MIDDLE SCHOOL

City: Charlotte  
Mascot: Bulldog  
htcms.org  
704.527.7822



## OUR LADY OF MERCY CATHOLIC SCHOOL

City: Winston-Salem  
Mascot: Mustang  
ourladyofmercyschool.org  
336.722.7204



## ST. MATTHEW CATHOLIC SCHOOL

City: Charlotte  
Mascot: Wildcat  
stmattwildcats.com  
704.544.2070



## BISHOP MCGUINNESS CATHOLIC HIGH SCHOOL

City: Kernersville  
Mascot: Villain  
bmhs.us  
336.564.1010



## IMMACULATA CATHOLIC SCHOOL

City: Hendersonville  
Mascot: Stars  
immac.org  
828.693.3277



## SACRED HEART CATHOLIC SCHOOL

City: Salisbury  
Mascot: Dolphin  
salisburycatholicsschool.org  
704.633.2841



## ST. MARK CATHOLIC SCHOOL

City: Huntersville  
Mascot: Lion  
stmackatholicschool.net  
704.766.5000



## CANONGATE CATHOLIC HIGH SCHOOL

City: Arden  
Mascot:  
canongatecatholic.org  
828.712.8924



## IMMACULATE HEART OF MARY CATHOLIC SCHOOL

City: High Point  
Mascot: Eagles  
ihm-school.com  
336.887.2613



## ST. ANN CATHOLIC SCHOOL

City: Charlotte  
Mascot: Saint  
stanncatholic.com  
704.525.4938



## ST. MICHAEL CATHOLIC SCHOOL

City: Gastonia  
Mascot: Tiger  
stmichaelcs.com  
704.865.4382



## CHARLOTTE CATHOLIC HIGH SCHOOL

City: Charlotte  
Mascot: Cougar  
charlottecatholic.org  
704.543.2419



## OUR LADY OF THE ASSUMPTION CATHOLIC SCHOOL

City: Charlotte  
Mascot: Phoenix  
olacatholic.org  
704.531.0067



## ST. LEO CATHOLIC SCHOOL

City: Winston-Salem  
Mascot: Lions  
stleocatholic.com  
336.748.8252



## ST. PATRICK CATHOLIC SCHOOL

City: Charlotte  
Mascot: Leprechaun  
saintpatrickschool.org  
704.333.3174



## CHRIST THE KING CATHOLIC HIGH SCHOOL

City: Huntersville  
Mascot: Crusader  
ctkchs.org  
704.799.4400



## OUR LADY OF GRACE CATHOLIC SCHOOL

City: Greensboro  
Mascot: Panther  
olgsch.org  
336.274.6520



## ST. GABRIEL CATHOLIC SCHOOL

City: Charlotte  
Mascot: Jaguar  
stgabrielcatholicsschool.org  
704.366.2409



## ST. PIUS X CATHOLIC SCHOOL

City: Greensboro  
Mascot: Comet  
spxschool.com  
336.273.9865

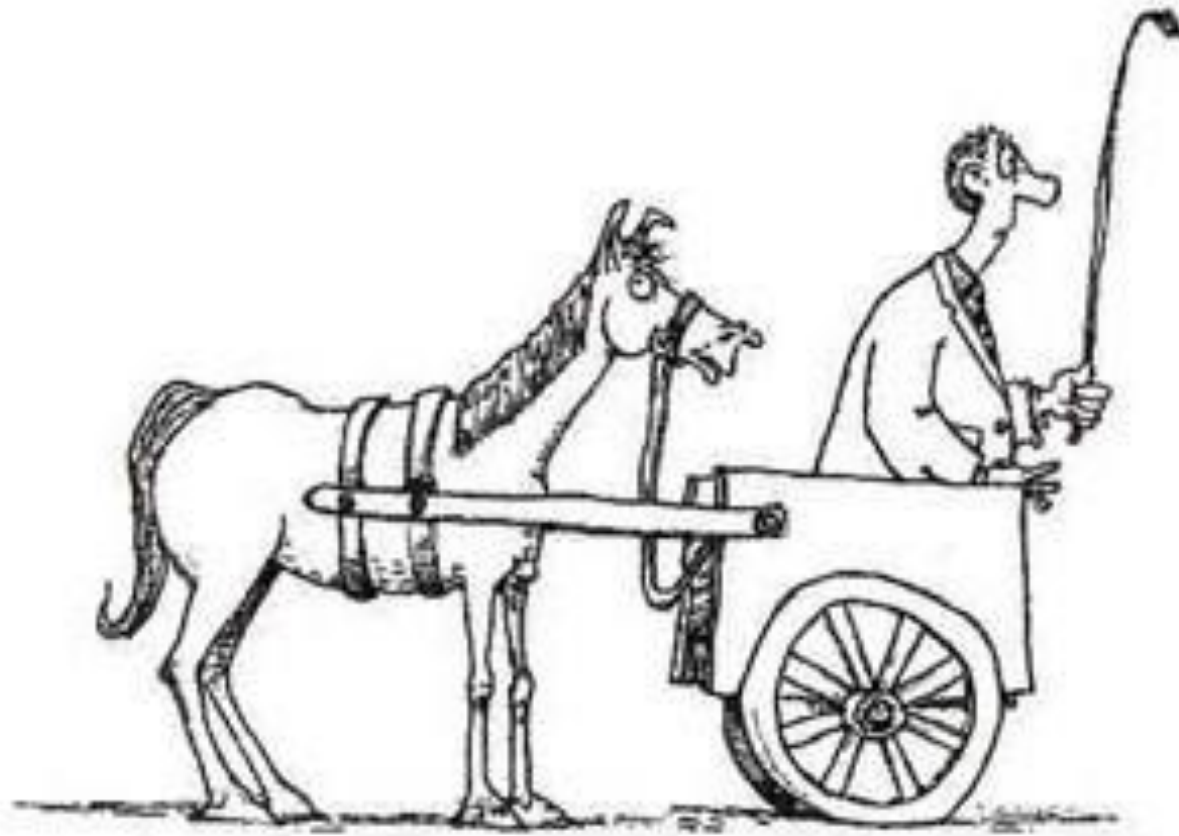


# Fiscal Year Giving 2021-22



- Annual Fund = \$1.3 million
  - 8 new launches
- Donors = 1,785
- Overall = \$3.3 million (includes endowment, PTO/Booster, other restricted gifts)
- Largest = Charlotte Catholic High School (\$362,576)
- Most Impressive = Sacred Heart “1882 Fund” (\$184,000) with 18% to Endowment
- Most first-time donors = Our Lady of Assumption (70 new at \$4,000)
- 33,000 letters mailed
- Average gift = \$631
- Cost/Dollar = 5%





Fund Development...sometimes done contrary to the normally effective sequence of events

# Fund Development and Marketing/Communication Workshop

## Welcome/State of Schools

- Superintendent – Dr. Greg Monroe

## Keynote

- Fr. Michael Martin – “Anchors and Sails”

## General Sessions

- MarCom 101 – Tara Hackman
- Fund Development 101 – Ben Hoke

## Breakout Sessions

- Campaigns
- Annual Fund
- Social Media
- Creating a Magazine

WEDNESDAY, SEPTEMBER 7  
9:00 AM-1:00 PM  
PASTORAL CENTER

The Marketing and Fund Development Workshop, jointly presented by the Catholic Schools Office and the Development Office, is open to Principals and school colleagues in admissions, enrollment, marketing, finance, and fund development roles.

Attendees will sharpen their skills, network with peers from around the diocese, find inspiration, and acquire great takeaways!

### EVENT AGENDA


#### Welcome & State of the Schools

9:00AM

- Coffee and Pastries

9:15AM


- Welcome and Opening Prayer
- State of the Schools, Dr. Gregory Monroe, Superintendent of Catholic Schools



#### Keynote Address: "Anchors & Sails" Fr. Michael Martin, O.F.M. Conv

9:30 AM

Fr. Michael Martin, O.F.M. Conv, serves as the Pastor of St. Philip Benizi parish in Atlanta, GA. From 2010-2022 he served as the Director of the Duke Catholic Center. Prior, Fr. Mike served as President of his high school alma mater, Archbishop Curley High School in Baltimore, MD. In his role as President, Fr. Mike was the catalyst for transformational growth in all facets of school leadership, advancement, enrollment, finances, personnel and facility planning. A lifelong educator, Fr. Mike was Principal of Archbishop Curley prior to his tenure as President. He holds a S.T.B. degree in Theology from the Pontifical Theological Faculty at St. Bonaventure - The Seraphicum in Rome, Italy, a M.Ed. in Catholic Education Administration from Boston College, as well as his Bachelor's degree in Philosophy from St. Hyacinth College-Seminary, Granby, Massachusetts.





#### Sessions

10:30 AM

- MarComm 101: Tara Hackman, Director of Marketing and Enrollment for Catholic Schools

11:00 AM

- Fund Development Starter Kit: Ben Hoke, Director of Development for Catholic Schools



#### Breakout Groups

11:30 AM

- Campaign Front Lines: Mike Miller, Principal at Asheville Catholic School
- 1882 Annual Fund Success: Camile Denhard, Director of Operations at Sacred Heart

12:00 PM

# Toolkit: Fund Development Program

## 1. Recruit an Advancement Committee

- Bylaws – Committee Roles / Responsibilities
- National Resources – Standards and Data
- Development Cycle
- Define “Advancement”
- Understand Donor Pyramid
- Include Best Practices
- Agree on Shared Nomenclature

## 2. Conduct an Internal Audit

## 3. Write Fund Development Philosophy

## 4. Educate Donors on Distinctions

## 5. Approve a Gift Acceptance Policy

## 6. Benchmark Local/National Schools

## 7. Invest in a Donor Database

- Wealth Screening
- Segmented Constituencies

## 8. Create Giving Levels

## 9. Prioritize Top Prospects

## 10. Train Leadership Volunteers

## 11. Strategic Planning

## 12. Articulate Case for Support

## 13. Evolve a Donor Relations Program

## 14. Embrace a Culture of Philanthropy

## 15. Hire Advancement Director

## 16. Ready to Start a Major Gifts Program!



# 1. Advancement Committee (SLC/Board)

**PREAMBLE....**The School Leadership Council (SLC) / School Advisory Board (ADVISORY BOARD), is established to further the advancement of excellence in Catholic school education for students at [school name] Catholic School, by providing leadership, direction, and support.

## **Advancement/Development Committee**

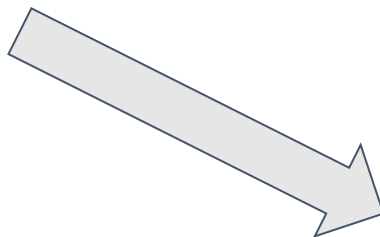
- **The Advancement/Development Committee assists the Administration with planning, creating, implementing, monitoring, and evaluating the school's advancement and development plan. Duties include:**
- 1. Advising and assist in creating an annual development or an institutional **advancement plan**
- 2. Assisting the Administration and SLC/ADVISORY BOARD in the implementation of **alumni and alumni parent events and activities**
- 3. Participating in, and providing **leadership for, programs of annual and planned giving** and periodic capital campaigns
- 4. Participating in the identification and solicitation of **major donor prospects**
- 5. **Supporting the school's development director** (if applicable) and/or the Director of Development for Catholic Schools
- 6. **Collaborates with the other standing committees: Executive, Strategic Planning, Selection, Marketing/Enrollment, Facilities, and Catholic Identify & Culture**

[Click Here](#) for SLC Bylaws

# Incorporate NCEA Standards

**Standard 13. An excellent Catholic School enacts a comprehensive plan, based on a compelling mission, for institutional advancement through communications, marketing, enrollment management, and development**

*From the National Catholic Education Association Standards/Benchmarks*



## NATIONAL STANDARDS AND BENCHMARKS FOR EFFECTIVE CATHOLIC ELEMENTARY AND SECONDARY SCHOOLS

### Summary of Standards

#### ACADEMIC EXCELLENCE

**7** An excellent Catholic school has a clearly articulated, rigorous curriculum aligned with relevant standards, 21st century skills, and Gospel values, implemented through effective instruction.

**8** An excellent Catholic school uses school-wide assessment methods and practices to document student learning and program effectiveness, to make student performances transparent, and to inform the continuous review of curriculum and the improvement of instructional practices.

**9** An excellent Catholic school provides programs and services aligned with the mission to enrich the academic program and support the development of student and family life.

#### OPERATIONAL VITALITY

**10** An excellent Catholic school provides a feasible three to five year financial plan that includes both current and projected budgets and is the result of a collaborative process, emphasizing faithful stewardship.

**11** An excellent Catholic school operates in accord with published human resource/personnel policies developed in compliance with (arch)diocesan policies and/or religious congregation sponsorship policies, which affect all staff (clergy, religious women and men, laity and volunteers) and provide clarity for responsibilities, expectations and accountability.

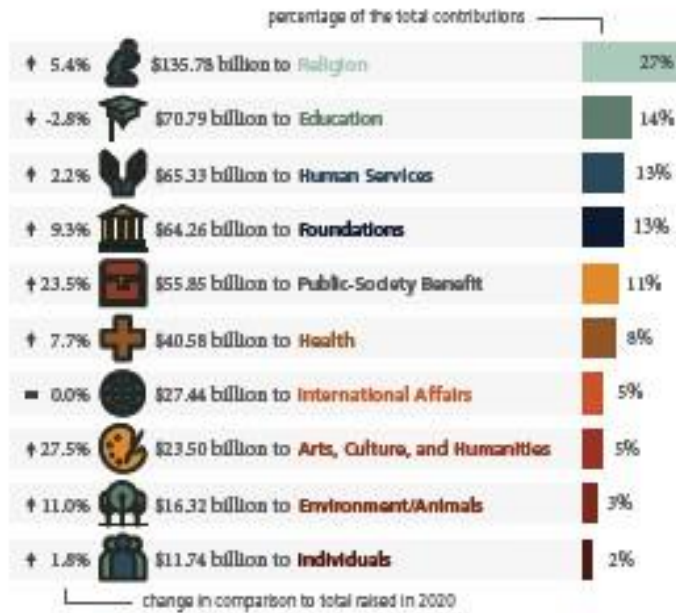
**12** An excellent Catholic school develops and maintains a facilities, equipment, and technology management plan designed to continuously support the implementation of the educational mission of the school.

**13** An excellent Catholic school enacts a comprehensive plan, based on a compelling mission, for institutional advancement through communications, marketing, enrollment management, and development.

# Highlight Giving USA Data

## Where did the charitable dollars go?

### Contributions by destination



Giving USA Foundation®, The Giving Institute, and the Indiana University Lilly Family School of Philanthropy are pleased to continue their partnership in providing the most comprehensive insight, analysis, and rigorously researched research on U.S. charitable giving, Giving USA: The Annual Report on Philanthropy. It is a privilege to report on Americans' generosity and related trends in the U.S. charitable giving.



## Where did the generosity come from?

### Contributions by source

By percentage of the total

**67%** \$326.87 billion

Giving by Individuals

↑ Increased 4.9% over 2020

**19%** \$90.88 billion

Giving by Foundations

↑ Increased 3.4% over 2020

**9%** \$46.01 billion

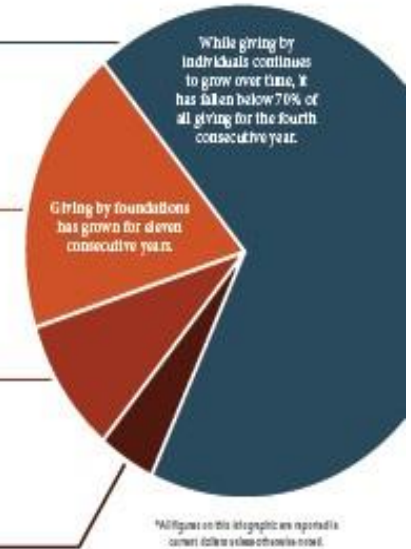
Giving by Bequest

↓ decreased 7.3% over 2020

**4%** \$21.08 billion

Giving by Corporations

↑ Increased 23.8% over 2020



# Development Cycle



- Identify key prospects
- Communicate message
- Cultivate donors
- Invite investment
- Be a good steward



# Define “Advancement”

ADVANCEMENT  
“Advancing the  
Mission”



## Strategy and Operations

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

## Revenue

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



# Donor Pyramid

The **best major gift/planned gift prospects** give to your school on an annual basis.

Critical to major/planned giving to dedicate time to **annual fund programs** and building relationships with annual donors.

And, holds true for a future **capital campaign!**



# Incorporate Best Practices



<https://www.ncea.org/>

<https://cupofcoffee.schneiderb.com/>

**Gifts That  
Give Back**

*A guide for independent school families on...*

How everybody wins—including you—when you volunteer

Why schools ask for tuition plus a gift

What those fund-raising appeals are really asking for



[Click here](#) for NAIS document

# Agree on Shared Nomenclature

**ANNUAL FUND** - Money for the school's current-year operating expenses that works like a checking account to help the school accomplish its daily work.

**MAJOR GIFTS** (Capital or Endowment) - Larger than annual fund gifts to meet capital and endowment needs the school cannot pay for out of tuition funds.

- **CAPITAL GIFT**: Schools conduct capital campaigns for brick and mortar building projects like new facilities or major renovations.
- **ENDOWMENT GIFT** - Major gifts to a fund that takes the pressure off the operating budget. Endowment principal remains intact as the school spends a percentage of the interest income. Diocese of Catholic Schools hold endowments with the Foundation of the Diocese of Charlotte.

**LEADERSHIP GIFTS** - Large donations that set the pace for giving at an early stage of an annual fund or capital campaign—although they may arrive at any time during a fundraising effort. Leadership gifts get a campaign off to a strong start and set an example of generosity for the entire community.

**PLANNED GIFT** - A gift vehicle—often a bequest, trust, or gift of real or personal property—that helps both the donor and the school. The donor reduces taxes, increases income, or satisfies another personal financial need. The school receives a significant outright or deferred gift.

## 2. Conduct Internal Advancement “Audit”



*The Goal: To develop a strong base of unrestricted support for general operations utilizing the solicitation methods of mail, phone, online and personal visits.*

***Assess Your Organization:***      **If you have:**      **Score**

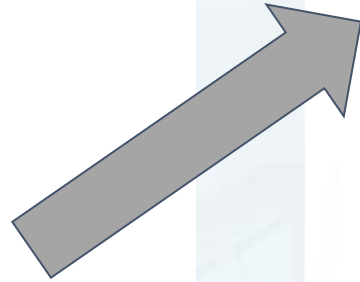
Annual Fund  
Case for Support  
Volunteers  
Prospect Review  
Database  
Special Event  
Donor Relations  
Planned Giving  
Campaign Readiness

- An annual personalized and segmented direct mail appeal - **15 points**
- Capability to receive donations electronically - **10 points**
- Solicit gifts electronically - **10 points**
- A strategic phone solicitation program - **15 points**
- Consistent personal solicitation calls for annual gifts - **15 points**
- Annual giving Leadership Society - **10 points**
- Track all cultivation/solicitation activity in a document - **15 points**
- Published annual report - **10 points**



# 3. Philosophy for Fund Development

[St. Edward the Confessor Catholic School](#)



## FUNDRAISING OVERVIEW

### Our Fundraising Philosophy

Gift wrap. Magazine drives. Bake sales. Jog-a-thons. Although these traditional fundraising vehicles can be very successful for schools, they also can be stressful for families, an administrative challenge for school leaders, taxing on parent volunteers, and ultimately an ineffective way to fundraise.

#### **Fundraising Goal: Create more opportunities for the school, students, and larger community.**

St. Edward Parish School strives to maximize fundraising dollars through strategic campaigns, be responsible stewards of advancement dollars, and continue to have the school's focus be education and service towards the less fortunate - not fundraising.

St. Edward Parish School's fundraising program focuses on three initiatives:

1) **Monarch Annual Fund** - St. Edward's top giving priority because it directly supports the school's greatest assets—our teachers and our students.

Proceeds are used in four critical areas: faculty and staff opportunities, student enrichment, campus enhancement, and tuition assistance. Be it faculty appreciation programs, curriculum enhancements, new tools for the classroom, fine arts opportunities, or the upkeep of our beautiful campus, the Monarch Annual Fund allows St. Edward Parish School to continue to grow and thrive! The primary campaign for this program is Monarch Giving Day, but on occasion, additional fundraisers may be added as support.

2) **Monarch Main Event (MME)** - One of the pillars of St. Edward is community! The school's largest fundraising event, MME provides an opportunity for Monarch families to join together in a night of fellowship, dinner, dancing and participating in live and silent auctions.

3) **Stewardship** - St. Edward Parish School values the gift of time and treasure as it provides opportunities for students and families to make a difference in the community through service opportunities.



## 4. Educate: What it is? What it Does? What it Funds?

	CCHS Annual Fund Together For Catholic	The Gala	Endowment Funds	Capital Campaigns	Tuition	MACS Capital Fees
<b>What it is?</b>	Voluntary donations from current parents, alumni, parents of alumni, grandparents and friends of CCHS.	Charlotte Catholic's biggest annual fundraising event. "Gala Week" combines an online auction and the main event which includes dinner, dancing, band and a live auction.	Permanent investments in the future of Charlotte Catholic High School.	A targeted fundraising effort that takes place over a specific period of time, usually spanning several years. CCHS has had two capital campaigns in the past 30 years.	The primary cost to attend Mecklenburg Area Catholic Schools. It is the largest source of revenue for the schools.	Capital fees are assessed annually to each MACS family.
<b>What it does?</b>	Makes our school exceptional. Gifts to the annual fund provide support for academic programs and other operational initiatives that tuition alone does not cover.	Provides a fun community-building event for parents, alumni and supporters of CCHS that raises money for needs of the school.	Endowment gifts are accepted year-round and help secure long-term financial stability for CCHS.	Provides a framework for raising a substantial amount of money for a specific purpose and to meet a targeted need.	Makes us exist. Keeps the lights on, the classroom functioning and students receiving a Catholic education.	The capital fee provides for new buildings and capital repairs at all nine Mecklenburg Area Catholic Schools.
<b>What it funds?</b>	<ul style="list-style-type: none"> <li>Reward and retain teachers</li> <li>Tuition assistance</li> <li>Teacher grants</li> <li>Curriculum enhancements for students</li> <li>Support student life</li> <li>New technology</li> <li>Campus improvements.</li> </ul>	The proceeds from The Gala can vary from year to year. They might support undesignated funds, or target a specific need as determined by the principal and leadership team.	Gifts to the endowment are held and invested with the Foundation of the Diocese of Charlotte. A portion of the investment income from the endowment may be drawn annually to support CCHS, depending on the nature of the endowment.	Capital campaigns raise funds for significant campus enhancements, including the new Fine Arts Center.	<ul style="list-style-type: none"> <li>The general cost to educate students, including 1:1 technology</li> <li>Operating expenses</li> <li>Faculty salaries and benefits</li> <li>Classroom supplies</li> <li>Facilities costs.</li> </ul>	In recent years for CCHS, the MACS Capital Fee has provided for the stadium renovation, construction of the new parking deck and \$15 million of the \$22 million needed for the new Fine Arts Center.
<b>Designation Areas</b>	Annual needs of the school are determined by the principal and leadership team, and donations are used throughout the year to fund these priorities.	Previous Galas have funded tuition assistance and the Teacher Impact Fund. These needs are determined annually.	Donors may designate an endowment to several general areas or needs of the school. They include tuition assistance.	The purpose of each capital campaign is clearly identified before the campaign starts.	Tuition covers the operational budget.	MACS capital fees are designated through a strategic plan of the Catholic Schools Office.
<b>How it works?</b>	CCHS solicits contributions to the CCHS Annual Fund through the work of the Advancement Office and with volunteer leaders via letters, emails, newsletters, social media and phone calls.	CCHS invites participation in the Gala through personal asks, meetings, emails, newsletters, social media and through the network of parent volunteers.	To learn more about endowment giving opportunities, please contact Sally McArdle in the CCHS Advancement Office.	Capital campaign solicitations will occur via meetings, events, letters, email, and other dedicated campaign communications.	The MACS business office oversees tuition and the school's budget along with the principal.	Capital fees are assessed through tuition payments. Distributions are made through decisions by diocesan and school leadership.

Annual Fund

Gala

Endowment

Capital Campaigns

Tuition

Fees

<i>What it is</i>	<i>What it does</i>	<i>What it funds</i>
<b>Tuition</b>	Keeps the lights on, the classrooms functioning, and your students receiving a great Catholic education	Operating expenses, salaries and benefits, and facility costs
<b>Annual Fund</b>	Supports school-wide initiatives to address emerging student needs, support teachers and develop initiatives beyond what is covered with tuition	Teacher conferences and workshops, tuition assistance, program enhancements, and campus improvements
<b>PTO Events/ Gala</b>	Parent organizations promote community and host events to raise money for a specific project or dedicated	Projects vary year to year based on agreed upon needs

## Philanthropy at Charlotte Latin School

### The Latin Fund

- The Latin community is encouraged to give each year
- Funds 3% of the annual budget, providing for priority needs not covered by tuition
- Boosted by gifts on FLY DAY, Latin's annual giving day

### Capital Campaigns

- Latin's strategic plan drives fundraising priorities
- Focused on facility and endowment needs
- The Vision2020 campaign concluded on June 30, 2021, exceeding its goal and raising a total of \$31.8 million

### Planned Giving

- Commonly donated through a living will or trust
- A planned gift sustains long-term financial stability

### Special Interest Giving

- Restricted funds directed by the donor to specific areas of school life
- Support through parent organization membership and event fees
- Donations at annual or biennial school events, such as Celebrate Latin

### Gifts-in-Kind

- Donation of goods or services rather than funds
- Opportunities through parent organizations and annual events

### Volunteer Opportunities

- Builds community spirit through donations of time and talent
- Opportunities available in a variety of campus departments and parent organizations
- Service days that impact the greater Charlotte community







Secure Online Giving

The Knight Fund

Faithful Knights Monthly Giving

Ways to Give

Head of School Circle

## Gift Acceptance Policy

Bishop O'Connell High School ("the school") is deeply appreciative of donors who choose to make the school a priority when planning their charitable contributions. The school gladly accepts donations for the support of its students, programs and facilities that are in keeping with the mission and strategic plan of the school. The following is meant to be a set of guidelines for the evaluation and acceptance of donations.

+ II. Ethical Standards

+ III. Authority for Accepting Gifts

+ IV. Gift Types

+ V. Giving Opportunities

+ VI. Stewardship

+ VII. Advancement Office Procedures

+ VIII. Miscellaneous Provisions

# 5. Gift Policy

[Click Here](#) for Gift Acceptance Policy at Bishop O'Connell

# 6. Benchmark Against Peer Catholic Schools

Aka “Copy and Steal Everything”



St Johns Catholic - <https://www.saintjohnsprep.org/support-sjcp/annual-fund/annual-fund-appeal>

Monsignor Slade - <https://www.msladeschool.com/giving/make-a-gift-today>

St Austin - <https://www.staustinschool.org/support-us/annual-fund>

Bethesda Lourdes - [https://www.bethesda-lourdes.org/uploads/1/1/0/0/11005280/annual\\_fund\\_letter\\_2021.pdf](https://www.bethesda-lourdes.org/uploads/1/1/0/0/11005280/annual_fund_letter_2021.pdf)

CTK Burlington - <https://cksvt.org/how-can-you-support-the-annual-campaign>

Marin Catholic - <https://www.marincatholic.org/support-mc/supporting-mc/annual-fund>

St. Louis Priory - <https://www.priory.org/giving/priory-fund>

Overbrook - <https://www.overbrook.edu/giving>

## 7. Donor Databases

Little  
Green  
Light

 **virtuous**

 **donorperfect**

  
blackbaud®

  
arresta

  
bloomerang

 **NEON**



## Code, Expand, Segment

## Constituent Groups

- Current Parents
- Alumni
- Parents of Alumni
- Grandparents
- Grandparents of Alumni
- Parishioners
- Faculty and Staff
- Friends
- School Vendors
- Board Members
- Widows of Alumni
- Foundations
- Matching Gift Cos.
- Local Businesses
- Graduating Students

# 8. Establish Giving Levels

- Define a Leadership Circle
- How those donors are recognized?
- Use Founding Year?
- **More Science than Art**



## Together for Catholic: Giving Levels

\$10,000+	The 1955 Circle
\$5,000 - \$9,999	Our Lady of Mercy Circle
\$2,500 - \$4,999	St. Joseph's Circle
\$1,000 - \$2,499	Principal's Circle
\$500 - \$999	Leaders Circle
\$250 - \$499	Scholars Circle
\$100 - \$249	Loyalty Club
up to \$99	Supporter



### Proposal for Support

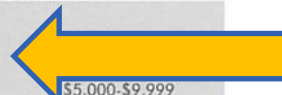
**Mr. Larry Furey**  
 124 Sycamore Dr  
 Westwood, MA 02090-3233  
 Requested Gift: **\$50**

**Your response by May 15th is greatly appreciated!**  
 The Knight Fund is a powerful source of annual funding that enables Bishop O'Connell to be a leader in Catholic college-preparatory education.  
 Your gift to the Knight Fund is more than just support for exceptional Catholic education. It's an investment in the lives of our students and the future of our community.

*Thank you  
 for your support!*

### GIVING SOCIETIES

<b>THE LEADERSHIP CIRCLE</b>	
Excalibur Society	
Bishop's Roundtable	
Knight's Society	\$5,000-\$9,999
Marquis Society	\$2,500-\$4,999
Sword & Shield Society	\$1,000-\$2,499
<b>GENERAL RECOGNITION CLUB GIFTS</b>	
Blue & Silver Club	\$500-\$999
School Spirit Club	\$250-\$499
Friends' Club	\$1-\$249



### FAITHFUL KNIGHTS MONTHLY GIVING PROGRAM

Joining the Faithful Knights is one of the most significant ways you can support Bishop O'Connell and our students. Your automatic monthly gift will provide predictable, dependable support that we can count on. A monthly gift of any amount will make a big impact!  
 Sign up on our website: [bishopoconnell.org/faithfulknights](http://bishopoconnell.org/faithfulknights)

**Yes! I would like to make a gift in support of Catholic education at Bishop O'Connell High School in the amount of**  \$50  \$100  \$150  \$\_\_\_\_\_

Preferred Email: \_\_\_\_\_  
 Mobile Phone: \_\_\_\_\_  
 MAKE A GIFT ONLINE AT [bishopoconnell.org/give](http://bishopoconnell.org/give)  
 GIVE BY CREDIT/DEBIT CARD:  
 Name of Cardholder: \_\_\_\_\_  
 Card Number: \_\_\_\_\_  
 Expiration Date: \_\_\_\_\_ Sec Code: \_\_\_\_\_  
 Signature: \_\_\_\_\_

Please use my donation to advance the following areas of the school:

Greatest Operational Need

Tuition Assistance     Technology in the Classroom

Student Activities     Faculty Professional Development

My gift is in memory or honor of (circle one): \_\_\_\_\_

I would like to remain anonymous.

GIVE BY CHECK:  
 Please make your check payable to Bishop O'Connell High School and return it in the enclosed envelope.

**Please check [bishopoconnell.org/matching](http://bishopoconnell.org/matching) for corporate matching gift opportunities.**





### 1882 FUND GIVING LEVELS

\$18,820 AND UP	Founder
\$5,000 - \$18,819	Legacy
\$1,882 - \$4,999	Leadership
\$1,000 - \$1,881	Heart
\$500 - \$999	Scholar
\$188.21 - \$499	Blue/Gold
Up to \$188.20	Friend

### The 1959 Fund Giving Levels:

Founders Circle \$10,000 and up

Leaders Circle \$5,000 - \$9,999

Head of School Circle \$2,500 - \$4,999

Benefactors Circle \$1,000 - \$2,499

Patrons Circle \$500 - \$999

Friends of Bishop McGuinness - Up to \$499

### Giving Levels

Founder	\$5,000 and up
Leader	\$2,500-\$4,999
Principal	\$1,000-\$2,499
Benefactor	\$500-\$999
Patron	\$250-\$499
Friend	\$1-\$249



# 9. Prioritize Top Prospects

1. Prospect Review Committee
2. Wealth Screening
3. Annual Fund Pipeline
4. Giving History Reports
5. Volunteer History
6. Special Event Support
7. Admission Forms
8. Corporate Biographies
9. Annual Reports (Google)
10. Research Database Notes



Annual Fund Leadership

- \$1,000 and above?

Major Gift

- \$25K or \$50K?

Endowment

Capital/Bricks & Mortar

Planned Gift



# Wealth Screening




## Annual Fund Leadership Gift Pipeline

SCHOOL	\$1000-2,499	\$2,500-\$4,999	\$5000-9999	\$10,000 and above
ACS	7	1	1	
BMCHS	26	8	1	3
Canongate				
CCHS	37	5	9	5
CTK				
HTCMS	11		1	
IHM				
Immaculata				
OLA	1			
OLG	2			
OLM				
Sacred Heart	22	4	3	4
SPX				
St. Ann	1		1	
St. Gabriel	1			
St. Leo				
St. Mark	8	1	1	
St. Matthew	12	4	1	
St. Michael	0	0	0	
St. Patrick	1			
Totals	129	23	18	12

# 10. Volunteer Training

[Click here](#) for the manual!



The image shows a white sign for St. Luke's School with the motto "ENTER TO LEARN, THE POWER TO SERVE". The sign is set against a background of green trees and a blue sky. In the foreground, there are red flowers.

**Annual Fund**  
Volunteer Training Manual 2020

st Luke's  
SCHOOL

377 North Wilson Road | New Canaan, CT 06840  
(203) 424-2989 | www.stlukesct.org

## VOLUNTEER EXPECTATIONS:

You are the most important ambassadors for the School and vital to the success of our Annual Fund. As a volunteer, you have the opportunity to communicate directly with parents, explain how crucial our Annual Fund is to the School, make personal connections and spread good cheer. As you reach out to your fellow parents, please keep the following in mind:

### MAKE YOUR OWN COMMITMENT

One of the most effective ways to solicit a gift is to ask a parent to join you in making a gift. We ask all committee members to kindly make your gift or pledge in the coming weeks.

### THANK PARENTS FOR THEIR TIME AND THEIR GIFTS

Open by thanking parents for their time and past giving (if appropriate). Once parents have committed to giving, please thank them for their participation in this year's effort and be sure to send them a thank you note or email.

### PERSONALIZE YOUR APPROACH

Review the name(s) and grade(s) of their son(s) and/or daughter(s). Connect over your SLS experiences!

### SILENCE IS GOLDEN

Ask for the specific gift amount located in your profile sheets, and then remain silent. Wait for your fellow parent to respond. Don't apologize for asking! If your fellow parent responds negatively, or says that they cannot consider a gift of that size, mention that a gift of any size makes a difference.

### KEEP IN TOUCH WITH US

Keep Cindy Dill, Annual Giving Director, or a member of the Annual Fund Leadership team informed of your progress. Whether you encounter a barrier, a hard-to-reach family, or some other obstacle to a gift, the earlier you let us know, the sooner we are able to assist. The office is always available by phone if questions arise.

### BE PERSISTENT

If you at first don't succeed, try and try again. Feel free to leave a message, and then follow up via email shortly thereafter (or vice versa).

## BE OPTIMISTIC, ENTHUSIASTIC, AND **HAVE FUN!**





# 11. Strategic Plan

**Strategic Goal: Develop a comprehensive development and communications program to engage all members of the CCHS community. Cultivate relationships resulting in financial support for CCHS.**



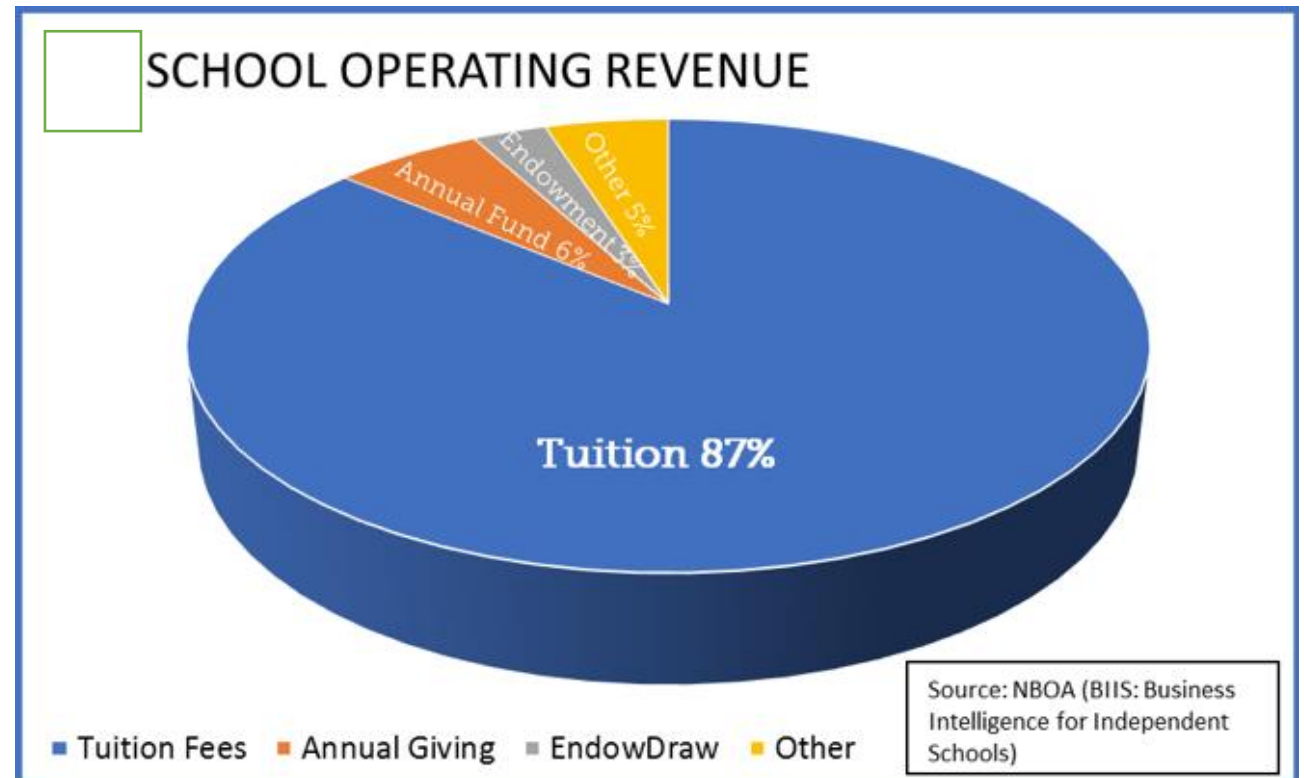
- Objective 1: Build advancement capacity and add staff resources to support the Strategic Plan.
- Objective 2: Develop comprehensive fund development plan and deepen the **culture of philanthropy to meet annual needs of the school and secure long-term financial sustainability.**
- Objective 3: Communicate purposefully and effectively with CCHS faculty, staff, parents, alumni and supporters (also see marketing and enrollment key focus area).



# 12. Case for Support – Why Give?

## Use multiple channels

- Website
- Printed Collateral
- Community Events – Gala, GP Day, Back to School Nights
- School Magazine
- Digital newsletters
- Awareness gatherings
- Admission materials



# Update Website



- [DONATE](#)
- [ANNUAL FUND](#)
- [GIVE ONLINE](#)
- [MATCHING GIFTS](#)
- [CAPITAL CAMPAIGN](#)
- [MEMORIAL GIFTS](#)
- [ENDOWMENT](#)
- [GIFTS OF APPRECIATED STOCK](#)
- [ANNUAL REPORT](#)

## WHY GIVE TO OVERBROOK SCHOOL

Overbrook School is an independently-owned, private, Catholic school with a proud tradition of forming students in knowledge, wisdom, and truth since 1936. Open to preschool through the 6th grade, generations of alumni call Overbrook home.

Giving to Overbrook is an investment in the students, teachers, classrooms, and community built and cherished on the Dominican Campus. Funds raised through our on-going giving campaigns are managed prudently and with fidelity to our call from St. Peter: As generous distributors of God's manifold grace, put your gifts at the service of one another each in the measure he has received.

Secure Online Giving

The Knight Fund

Faithful Knights Monthly Giving

Ways to Give

The Leadership Circle

Support Our Scholarships

Stewart, Whitehead, and Winters  
Endowed Scholarship

Sponsorship Opportunities

Annual Gala & Auction

Sponsor Our Gala

5K & Fun Run

Connolly Classic Golf  
Tournament

Planned Giving

# 13. Donor Relations - Acknowledgement and Recognition Program

- Database Integrity
- Gift Tracking
- Gift Acknowledgement
- Personal follow up
- Impact stories “dollars at work”
- Annual Reports
- Thank You Events
- Use Students!





# Donor Stewardship Program Checklist

There's a lot to consider when creating your donor stewardship program. Use this checklist to ensure you've thought through all the details.

## Stages of Stewardship

### Gift Acceptance

- Create a structure for giving opportunities with a variety of levels and designations.
- Review each gift to ensure it can be used the way the donor intends.
- Develop a policy for how gifts will be handled if they can't be applied the way donors expected.
- Have a procedure for gift tracking so you can easily follow how each gift was used.

### Acknowledgement & Recognition

- Send gift receipts in a timely manner, being sure to meet IRS requirements.
- Send a thank you letter immediately to recognize the gift.
- Follow up with an email, phone call, and/or visit (depending on the level of the gift).
- Brainstorm creative ways to convey gratitude, such as personalized thank you notes from clients, students, or others who have been helped by the gift.

### Reporting

- Send campaign updates via email and direct mail.
- Feature stories in your organization's newsletter, publication, or blog.
- Post updates on social media channels.
- Produce case studies that highlight the community you serve.
- Share impact reports that feature your successes and the change your nonprofit creates.
- Publish financial reports to increase transparency and build trust.

### Cultivation

- Share plans for the next stages of projects that donors have given to in the past.
- Suggest related programs that donors may be interested in after giving to a particular need.
- Ask donors to spread the word about a project or program they're passionate about via social media.
- Invite donors to an onsite event or tour to see the results of their gifts firsthand.

Network  for Good.

**Steward Your Donors  
with Network For Good**

[Click Here](#) for “How to Create a Donor Stewardship Program to Boost Retention” Whitepaper



# Acknowledgment Letters



September 16, 2013

Dear Larry,

As our students come to school each morning and walk through a brighter and safer main entrance, they are reminded of the generosity of so many donors from our St. Teresa family. I am happy to report that our 2012-2013 focus on facility enhancement enabled us to:

- Install more secure, handicap-accessible doors at the front entrance
- Open up the main office to give our secretary a better view of visitors
- Improve the foyer to make it more welcoming for our guests.

Furthermore, gifts to the annual fund assist many students with financial aid so they can continue their education at St. Teresa School. We want to ensure that every family who wants to send their children to St. Teresa School can afford to do so. Therefore, our focus for 2013-2014 will be stabilizing tuition which will benefit all our students.

**You have the opportunity to help the children of our parish and community benefit from a top-notch Catholic education. Please consider making an investment in their future with a gift to the Second Century Fund.** Every gift makes a difference!

Again this year, you can increase the impact of your gift by participating in Pittsburgh's "Day of Giving" on October 3. Donations to St. Teresa School made online at [www.pittsburghgives.org](http://www.pittsburghgives.org) on October 3 will receive a partial match from The Pittsburgh Foundation. We encourage you to make your gift on October 3 at [www.pittsburghgives.org](http://www.pittsburghgives.org) and designate your donation for St. Teresa of Avila School. Detailed directions are on the back of this letter.

Gifts to the annual fund increased by almost \$20,000 last year due to outstanding participation in the Day of Giving! We hope to increase that support this year, so please mark your calendar for October 3 and plan to make your annual fund gift online. If you are unable to make your gift at that time, you can make a tax-deductible gift to the Second Century Fund by returning the enclosed commitment form today.

On behalf of our students, thank you for believing in and supporting St. Teresa School.

*Thanks for your support and initial inspiration! We are going strong!*

Sister Karen Brink, OSB  
Principal

*P.S. Please remember that you can amplify the value of your gift by participating in Pittsburgh's "Day of Giving." Simply visit [www.pittsburghgives.org](http://www.pittsburghgives.org) on October 3 to be eligible for a partial match of your gift! Thank you for helping our students.*

Saint Teresa of Avila School • 800 Avila Court • Pittsburgh, Pennsylvania 15237  
tel: 412-367-9001 • fax: 412-364-1172 • [www.SaintTeresa.org](http://www.SaintTeresa.org)



January 26, 2022

Mr. & Mrs. James K. Kelley  
2923 Hiddenbrook Way  
Indian Land, South Carolina 29707-1524

Dear James & Joan:

As we turn the page into a new year, I think I speak for many when I say I welcome 2022! I join the entire Hoban community - our Holy Cross educators, students, and families - in saying **thank you**, extending our sincere appreciation for your belief and support of Archbishop Hoban High School this past year.

In 2021, you played a crucial role in advancing the Holy Cross mission at Hoban. Thanks to you, we continue to deliver on our promise to our students- educating the heart and mind, nurturing the smallest spark of passion, and providing a high-quality education grounded in faith, service, and innovation. We truly could not have done this without you.

I am pleased to provide the enclosed **Annual Giving Summary** reflecting your generous contributions to Hoban this past calendar year. **This summary does not replace your official gift receipt you received at the time of your donation but can help as you prepare your 2021 income tax returns.** The report includes outright gifts and payments on pledges. Please consult a tax professional as most charitable donations, other than raffle tickets which are a game of chance, may be deductible to the extent allowable by law.

With gratitude, your name as it appears in the address above is listed in our donor database and may be published, either in print or online, for recognition purposes. Please contact the Advancement Office at 330.773.8620 or [advancement@hoban.org](mailto:advancement@hoban.org) if you have a change, correction or wish to remain anonymous.

Your generosity is a testament to the strength of our Hoban family and reflects what it means to be *True to You*. I hope you join me in supporting Hoban in 2022 and beyond - we have many exciting updates, opportunities, and challenges to share with you!

Gratefully,

Laura Jo (Marcinkoski '83) Hawk, MAM, CFRM  
Vice President of Institutional Advancement

For lasting support please consider remembering Hoban in your W&E and estate plans. For important school and alumni updates, please follow **Archbishop Hoban High School** and **Archbishop Hoban High School Alumni** on Facebook, Instagram, Twitter, and LinkedIn.

One Holy Cross Boulevard • Akron, Ohio 44306 • P: 330.773.8658 • F: 330.773.9100 • [www.hoban.org](http://www.hoban.org)



**SACRED HEART CATHOLIC SCHOOL** [www.salburycatholicsschool.org](http://www.salburycatholicsschool.org)  
385 LUMEN CHRISTI LANE • SALISBURY, NC 28147 • PHONE: (704) 633-2841 • FAX: (704) 633-6033

August 8, 2022

Mr. Bennett Hoke  
6201 Glenridge Rd  
Charlotte, NC 28211

Dear Mr. Hoke,

As we celebrate 140 years of Catholic education at Sacred Heart Catholic School, we thankfully reflect on the many generous donors who have contributed in various ways to support our school mission over the years. Being rooted in the three core values of faith, academics and service allows our students to continuously develop from learners to leaders.

We are pleased to report The 1882 Fund for the 2021-2022 fiscal year raised over \$183,000.00 with just over \$136,000.00 raised during the six week winter campaign. Our parish, school families and wider community showed tremendous support with 254 individual donations and 97% school family participation! Together, we responded with generosity to support the mission of Catholic education and SHCS.

Thank you for your support of The 1882 Fund: \$10.00  
Donation Date: 3/10/2022

Your investment to The 1882 Fund directly impacts the school's greatest assets - our students and our teachers! Supporting faculty and staff retention, recruitment, and reward, providing tuition assistance for families in need, virtuous leadership development and enhancing co-curricular activities are a few examples of how your gift impacts our school community. In addition, an investment of over \$25,000.00 (18.82% of the six week winter campaign's proceeds) was made in the Mr. T Endowment Fund that provides tuition assistance to future generations of Sacred Heart students.

Sacred Heart develops our learners today for leaders tomorrow who have their eyes set on Heaven. Once again, we are so thankful for your prayers and continued financial support of Sacred Heart Catholic School.

Sincerely in Christ,

Fr. John Eckert  
Pastor

Erin Brinkley  
Principal

Camile Denhard  
The 1882 Fund Chairperson

**Think . Serve . Lead . Believe . Since 1882**  
*Learners to Leaders*



Note: Pursuant to sections 170 (f) (8) of the Internal Revenue Code, which addresses substantiation of charitable contributions, this is to acknowledge the fact that Sacred Heart Catholic School did not provide any goods or services in whole or partial consideration for the above contribution, or provided only intangible religious benefits.



# Printers Proof/Preliminary Report

- Separate parent proof sheet listing giving
- Participation by class, not giving levels.
- If multiple children, list them in each class.
- Includes all gifts up and until print date
- If you don't see your name, there's still time!
- Usually sent after Spring Break

**= Drives increased participation**



This preliminary report reflects 2018-2019 Waterford Fund gifts and pledges received between September 1, 2018 and May 13, 2019. Please review that your name is listed properly. If you have a correction, please contact Verity Flurer in the Advancement Office at (801) 816-2217 or [verityflurer@waterfordschool.org](mailto:verityflurer@waterfordschool.org).

If you would like to donate to the 2018-2019 Waterford Fund or fulfill an open pledge, please send your gift in by August 31, 2019 in order to secure your listing in the final copy of the Annual Report. There's still time to participate in this important effort.

Waterford Fund gifts support a world-class liberal arts education that stimulates intellect, ignites passion, and shapes character. Whether it is in the classroom, on the playing field, up on stage, or serving others, our students and faculty strive to make every day count. Just as every day counts, so does every gift!

Thank you to our current and future supporters for "Making the Connection" to this year's Waterford Fund!

## WATERFORD FUND GIFTS September 1, 2018 through May 13, 2019

### CLASS OF 2019 (XII)

#### 54% Participation

Anonymous  
Liz and David Anderson  
Melanie and Michael Battistone  
Virginia Vierra and Brandon Bennett  
Deann and Thomas Brennan  
Cindy and Bob Bruce  
Haiyan Wei and Gang Cheng

Molly and Mark Law  
Nicole MacLaren  
Neylan McBaine and Elliot Smith  
Amy and Rod McKinlay  
Maria and Gayland Moffat  
Heather and Daren Mortenson  
Siri and Henrik Ostbed  
Kyndra and Douglas Peterson  
Susan Pitzitz  
Cari and Eric Rasmussen

Cristiane and Guilherme Del Fiol  
Suzanne and Gary Dildy  
Cathy and Brent Dover  
Sarah and Jason Dunn  
Alison and Matthew Forkner  
Deb and Dave Hafner  
Lisa Walker Harris '96 and Rod Harris  
Sage and Andrew Henrikson  
Sara and Joseph Hershkop  
Rosa and Karl Kieffer

## Annual Fund Giving by Class

**K1 - Participation: 54%**  
**Class Captains: William Lai and Deborah Moore-Lai**  
Mr. and Mrs. Keith Bachman  
Mr. and Mrs. Michael Eisenstein  
Mr. and Mrs. Scott Grenert  
Mr. and Mrs. William Lai  
Mr. and Mrs. Michael Pelletier  
Mr. and Mrs. Shawn Riley  
Mr. and Mrs. Salvatore Rusello

**K2 - Participation 63%**  
**Class Captains: Brandon and Kelly Fernald**  
Mr. and Mrs. Kevin Atwood  
Mr. and Mrs. James Bertucci  
Mr. and Mrs. Peter Carbone  
Mr. and Mrs. Thomas Conway  
Mr. and Mrs. Michael DeJesus  
Mr. and Mrs. John delRosario  
Mr. and Mrs. Eric Erps  
Mr. and Mrs. Brandon Fernald  
Mr. and Mrs. Richard Geoghegan  
Mr. and Mrs. Mark Kelly  
Dr. Bozidar Kuljic  
& Dr. Natasa Mandic-Kuljic  
Mr. and Mrs. Peter Nugent  
Mr. and Mrs. Timothy O'Brien  
Mr. and Mrs. Thomas Pelletier  
Mr. and Mrs. Mark Pyne

**Grade 1 - Participation: 60%**  
**Class Captains: Scott and Dori Grenert**  
Mr. and Mrs. Christopher Baroud  
Mr. and Mrs. Gary Bruch  
Mr. and Mrs. Sean Corcoran  
Mr. and Mrs. Michael Eisenstein  
Mr. and Mrs. Peter Flomp  
Mr. and Mrs. Scott Grenert  
Mr. and Mrs. Deane Gyllenhaal  
Mr. and Dr. Charley Kersten  
Mr. and Mrs. Shawn Riley

Mr. and Mrs. Shawn McNinch  
Mr. and Mrs. Timothy O'Brien  
Mr. Anthony Parisi  
and Ms. Kim Cross  
Mr. and Mrs. Michael Pinciaro  
Mr. and Mrs. Martin Plecinoga  
Mr. and Mrs. Gazmend Taka  
Mr. and Mrs. David Vredenburgh  
Mr. and Mrs. Stephen Weidman

**Grade 3 - Participation: 82%**  
**Class Captains: Robert and Kim Andersen**  
Mr. and Mrs. Richard Alimenti  
Mr. and Mrs. Robert Andersen  
Mr. and Mrs. Brian Burke  
Mr. and Mrs. Peter Carbone  
Mr. and Mrs. Raymond Clark  
Mr. and Mrs. Jay Cobak  
Mr. and Mrs. Thomas Conway  
Mr. and Mrs. James Cunningham  
Mr. and Mrs. John delRosario  
Mr. and Mrs. Peter Flomp  
Mr. and Mrs. Kevin Gannon  
Mr. and Mrs. Brian Gilligan  
Mr. and Mrs. Deane Gyllenhaal  
Mr. and Dr. Charley Kersten  
Mr. and Mrs. Lew Paragona  
Mr. and Mrs. John Perry  
Mr. and Mrs. Kevin Toler  
Mr. and Mrs. Matthew Ventre

**Grade 4 - Participation: 66%**  
**Class Captains: James and Mary (McShane '85) Bertucci**  
Mr. and Mrs. James Bertucci  
Mr. Kevin Blatchford  
and Ms. Ann McCann  
Mr. and Mrs. Gary Bruch  
Mr. and Mrs. Jon Cary  
Mr. Michael Coleman  
and Ms. Robyn Egan  
Mr. and Mrs. John Doyle  
Mr. and Mrs. John Dwyer

**Grade 5 - Participation 77%**  
**Class Captains: Thomas and Cristina (DiFazio '87) Urbanski**  
Mr. and Mrs. Robert Andersen  
Mr. and Mrs. James Brodbine  
Mr. and Mrs. Peter Carbone  
Mr. and Mrs. Raymond Clark  
Mr. and Mrs. Jay Cobak  
Mr. and Mrs. Kevin DeLorenzo  
Mr. and Mrs. Kevin Gannon  
Mr. and Mrs. Brian Gilligan  
Mr. and Dr. Charley Kersten  
Mr. and Mrs. Douglas Linehan  
Mr. and Mrs. Michael McShane  
Mr. and Mrs. Dana Ross  
Mr. and Mrs. Kevin Toler  
Mr. and Mrs. Daniel Tremblay  
Mr. and Mrs. Thomas Urbanski  
Mr. and Mrs. Brian Wolonsavich

**Grade 6 - Participation: 73%**  
**Class Captains: Bob and Judy (Flaherty '73) Hanlon**  
Mr. and Mrs. Nicholas Ambeliotis  
Mr. and Mrs. Alan Bird  
Mr. and Mrs. Stewart Blessington  
Mr. and Mrs. Geoffrey Cairns  
Mr. and Mrs. Troy Campbell  
Mr. and Mrs. Walter Cataldo  
Mr. and Mrs. Robert Corneau  
Mr. and Mrs. Colin Gallagher  
Mr. and Mrs. Robert Hanlon  
Mr. and Mrs. Robert LaPorte  
Mr. and Mrs. Robert Lyons  
Mr. and Mrs. Shawn McNinch  
Mr. and Mrs. David Miller  
Mr. and Mrs. Peter Nugent  
Mr. and Mrs. Thomas O'Hare  
Mr. and Mrs. John Perry  
Mr. and Mrs. James Pica  
Mr. and Mrs. Robert Vallette  
Mr. and Mrs. Matthew Ventre

**Grade 7- Participation: 66%**

Mr. and Mrs. Richard Hrycaj  
Mr. and Mrs. James Knowlton  
Mr. and Mrs. Douglas Linehan  
Mr. and Mrs. Stephen McMahon  
Mr. and Mrs. Michael McShane  
Mr. and Mrs. David Miller  
Mr. and Mrs. William Murphy  
Mr. and Mrs. Richard Stevens  
Mrs. Lisa Tocco  
Mr. and Mrs. Daniel Tremblay  
Mr. and Mrs. Thomas Urbanski  
Mr. and Mrs. David Vredenburgh  
Mr. and Mrs. Michael Waldron

**Grade 8 - Participation: 76%**  
**Class Captains: Karen Torkildsen, Joan Spencer and Norah Zeroka**  
Mr. Kevin Blatchford  
and Ms. Ann McCann  
Mr. and Mrs. William Bresnahan, Jr.  
Mr. and Mrs. Walter Cataldo  
Mr. and Mrs. William Colehower  
Mr. and Mrs. John Dwyer  
Mr. and Mrs. Anthony Fusco  
Mr. and Mrs. Brian Harty  
Mr. and Mrs. Denis Hegarty  
Mr. and Mrs. Woodrow Howell  
Mr. and Mrs. Kevin Leahy  
Mr. and Mrs. Timothy McCarthy  
Mr. and Mrs. Thomas McDonald  
Mr. and Mrs. Shawn McNinch  
Mr. and Mrs. James Pica  
Mr. and Mrs. David Sarowsky  
Mr. and Mrs. Marc Silvagni  
Mr. and Mrs. Neil Spencer  
Mr. and Mrs. Robert Torkildsen  
Mr. and Mrs. Thomas Urbanski  
Mr. and Mrs. Robert Vivenzio  
Mr. and Mrs. David Vredenburgh  
Mr. and Mrs. Richard Zeroka



Trinity School (Charlotte, NC)  
 Click Here for [Impact Report](#)



Planting a garden is an act of hope - looking at a patch of earth and believing in its potential to grow life and bring beauty to the world. It's a belief in the future. But just as important as that optimism is the work required for that garden to grow. The Trinity Fund represents the hope and the work that you find in the garden. Because of the Trinity community's nurturing through the Trinity Fund, the people of Trinity - students, families, and staculty - grow and thrive. In this report, we want to celebrate that work and show you what can happen with a few seeds of hope.

BY THE NUMBERS  
 In the 2021-2022 School Year:

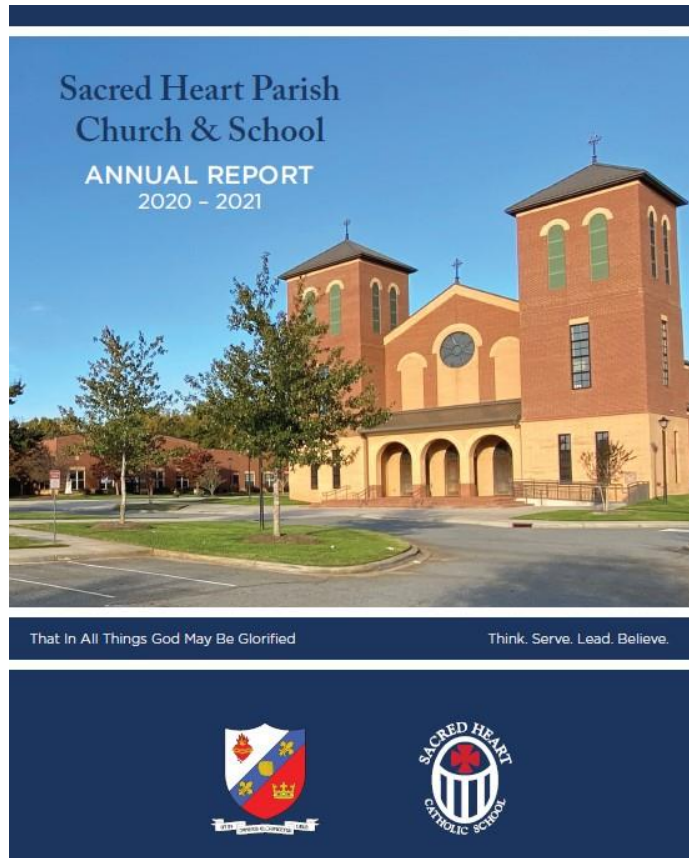


**\$2.1 million**  
 Given in Financial Support  
 in the 2021-22 School Year  
 TO 123 STUDENTS · 27% OF TRINITY STUDENTS

WHAT IS THE TRINITY FUND?	WHO SUPPORTS THE TRINITY FUND?
<p>The Trinity Fund is an annual fundraising campaign for Trinity Episcopal School. Annual funds typically bring to mind school expenses— operations, facilities, equipment. Yet, like so many things at Trinity, our annual fund looks a bit different. While it still invests in things that are essential to our community, what we have considered essential for over 20 years is our people. The Trinity Fund invests in our students through an ever-growing financial support program, and in our faculty and staff through ongoing professional development to grow as employees and as human beings.</p>	<div style="display: flex; justify-content: space-around;"> <div> <p>Participation by constituent:</p> <ul style="list-style-type: none"> <li>Trustee: 100%</li> <li>Staculty: 100%</li> <li>Parents: 76%</li> <li>Grandparents: 10%</li> <li>Alumni Parents: 8%</li> <li>Alumni: 7%</li> <li>Other: 2%</li> </ul> </div> <div> <p>Funds given by constituent*:</p> <ul style="list-style-type: none"> <li>Parents: 61%</li> <li>Alumni Parents: 24%</li> <li>Trustee: 23%</li> <li>Staculty: 3%</li> <li>Grandparents: 3%</li> <li>Alumni: 3%</li> <li>Other: 1%</li> </ul> </div> </div> <p><small>*Total is more than 100%, as some constituents are in multiple groups (For instance, a current parent may also be a faculty/staff member or trustee.)</small></p>

In 2021-22, 488 donors contributed to the Trinity Fund.  
 Many hands, from staculty and parents to alumni and Trustees, planted the seeds that took root and allowed our community to flourish.

# Annual Reports





# Annual Report Examples

[St. Laurence School](#)

[St. Sebastian](#)

[Sacred Heart](#)

[St. Edward the Confessor Parish School](#)

[Holy Trinity Catholic Church and School](#)

[Greenwich Catholic School](#)

[Marin Catholic School](#)

[Holy Trinity High School](#)

[All Saints Catholic School](#)

[St. Bernard](#)

# Culture of Philanthropy:

## *Haas Report*

What does a culture of philanthropy look like? The paper identifies and describes four core components of a culture of philanthropy:

### **#1 SHARED RESPONSIBILITY**

Fund development isn't just one person's job or the job of one department or board committee. Everyone—staff, Principal, constituents, board and volunteers—shares responsibility for fund development.

### **#2 INTEGRATION AND ALIGNMENT WITH MISSION**

Fund development is a valued and mission aligned component of the organization's overall work, rather than a standalone function.

### **#3 FUNDRAISING AS ENGAGEMENT**

Fund development is no longer separated from engagement. This reflects the fact that people today are connecting with nonprofits via multiple channels and engaging with them in multiple ways

### **#4 STRONG DONOR RELATIONSHIPS**

Donors are seen as authentic partners in the work, not simply as targets or dollar signs. These organizations establish systems to build strong relationships and support donors' connection to the work.

[Click Here](#) for the Haas Report Whitepaper

In A Fundraising Culture...	In A Culture of Philanthropy...
Philanthropy = grants by institutions or gifts from wealthy individuals.	Philanthropy = love of mankind.
Development staff is responsible for revenue generation.	Everyone in the organization shares some responsibility for revenue generation by serving as ambassadors and building relationships with potential donors and constituents.
It's all about the money.	It's all about the relationships.
Donors = money.	Donors = skills, talents, time and money.
Donors are contacted only when money is needed.	Donors are contacted regularly with invitations to participate in activities, progress updates, and information about how their contributions are helping.
Fundraising and engagement are siloed and have different contact lists.	There is one list for every person who's affiliated with the organization in some way (e.g., volunteering, donating, organizing, etc.).
Fundraising is seen as a one-off or add-on.	Fundraising is incorporated into and across every staff position and activity in the organization.
Culture is seen as "touchy feely."	Culture is the most important factor in determining an

# 15. Hire an Advancement Professional



La Salle Academy  
Vice President of Advancement  
Providence, Rhode Island  
January 2023

[Open Searches](#) at  
Partners in Mission

It is possible that prospective candidates could have attained this experience through a variety of different career paths, including secondary or higher education; non-profit leadership; or comparable work in the corporate or public sector. **Regardless of career path, the next Vice President of Advancement must have demonstrated proficiency and capacity in building and maintaining relationships that will ensure La Salle Academy's continued accessibility, success, and sustainability through the effective stewardship of its parent, alumni, and other philanthropic constituencies.**



# 16. Start a Major Gifts Program

## Eight Things to Know Before Fundraising for Major Gifts

**Identify** – Prospect review committee

**Research** - Do additional donor research using sources in the public domain

**Prioritize** - Cultivate top prospects face-to-face; document all communications.

**Teamwork** – Enlist help from the Principal/Head of School and Leadership Volunteers

**Cultivate** – Educate/train "cultivators" on how to develop the relationships

**Solicit** - Find the right person to ask the right prospect for the right amount at the right time.

**Steward** - After the gift, use good stewardship to maintain and nurture the donor's relationship to your school.



Nationally-based discussion group with **Diocesan level Development or Advancement Directors** who oversee fund development/advancement programs for **ALL** the schools in a Diocese.

# Thank You!



DIOCESE OF CHARLOTTE  
CATHOLIC SCHOOLS



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*The Mission of Our Catholic Schools: In communion with our families and parishes, we form students to be virtuous disciples of Jesus Christ. Rooted in Scripture, Tradition, and the defined teachings of the Catholic Church, our students pursue excellence of intellect, heart, and soul with salvation as the ultimate goal.*