

CATHOLIC DEVELOPMENT + QUARTERLY +

An informational DIGEST to guide development personnel in the emerging field of development.

Volume XIV, Edition 1

THE PARENT ANNUAL FUND

Our firm has always believed that a distinct difference exists between "fundraising" and "development." Our Catholic school parents are a tremendous source of energy and enthusiasm. Channeling them toward a development mentality distinct from a fundraising mentality is an important, long range, development goal.

We like to define fundraising as short term activities directed at immediate needs requiring immediate dollars (raffles, candy sales, magazine drives, dinners, car washes, jog-a-thons, auction, golf outings, etc.). The goal in fundraising is to raise immediate dollars. The goal in development is build lasting, loving, permanent relationships with people. A result of achieving that relationship goal will be donors and dollars. Part of that goal is implementing an Annual Fund. One key public in an Annual Fund is current parents.

BENEFITS OF A PARENT ANNUAL FUND

Inviting and involving parents to become donors and leaders in the Parent Phase of the Annual Fund will have a number of immediate as well as long term benefits:

- Establishes and Reinforces Development-parent giving to an Annual Fund helps to communicate that "development" is a vital cog in the school's strategic operations.
- Habit of Giving-an Annual Fund is just that-the creation of an "annual" habit of giving to your Catholic school.
- Development vs. Fundraising-the habit of giving garners repeatable gifts. Remember, when parents are involved in fundraising and the last child graduates they take their fundraising dollars with them. In development, a habit of giving based on a relationship is, ideally, established for the long term.
- Major Gifts-an Annual Fund is a platform for advancing a major gifts program.
- Database and Donor History-a database of previous donors that can be nurtured for leadership roles, major gifts and planned gifts.
- Perception of Strength and Viability-an Annual Fund is an invitation to parents and other publics to invest in Catholic education; it is also a strategic indicator telegraphing to the broader community that your institution is committed to the future and has a plan to get there.

- New and Renewable Sources of Revenue-Annual Funds are typically for annual operations but marketed with built in donor appeal. It can generate "budgetable," predictable dollars year in and year out.
- Tradition of Giving-early resistance will give way to tradition, thereby, anchoring both development and parent giving to the Annual Fund.

BUILDING THE CASE WITH PARENTS

Many outstanding parents are involved in our Catholic schools. It is important for parents to learn that Catholic schools are part of a broader faith community. The Catholic school fills an opportunity to provide their children a quality education. However, that experience provides the parents an opportunity to become part of a faith community. Our schools, hospitals, social services and other ministries fulfill a "market" need for these services. Fulfilling this market need is also the faith opportunity to involve parents in the educational mission of the Church.

Therefore it is more profound than fundraising during a moment in time when their children happen to be enrolled in the Catholic school. Working together to provide the resources for quality Catholic education is good stewardship. Many of our Catholic schools were founded years ago by another generation of parents, clergy, religious communities of women and men as well as concerned Catholics. Now is the opportunity for the current generation of parents to be good caretakers and pass on Catholic education to the next generation to follow. It should be passed on in even better condition than they found it.

The following ideas are ways in which to build a case with parents toward community in the Annual Fund and build the "practical case for support" in the Annual Fund.

- select parent leaders from the school community who appear to have the aptitude and skills for the Parent Annual Fund.
- take them through the school's mission statement and any process involved in creating the mission statement.
- educate them about Catholic education being a mission and major ministry of the Catholic Church as well as the history of the school, founders, religious communities that served the school, etc.
- invite "parents of graduates" who were development leaders in the past to meet with current school parents and pass on the legacy of Catholic education.
- create the "case" for the annual fund with the parents by reviewing the most recent accrediting process, strategic plan or diocesan on-site visitation recommendations; select items that will have donor appeal.
- typically, the Annual Fund will support the operations of the school, however, operational items can be creatively marketed in an Annual Fund: "teaching ministry, technology, faculty training, etc."
- outline how the Catholic school benefits both their children, broader faith community and the community at large.
- take all of this information and discussion and create a 1 to 2 page "case statement" for the Annual Fund.

- a "case statement" should contain the following: school philosophy, mission, (some) history, school impact, school strengths and gift needs (donor-appealing plans)for this year's Annual Fund.

ORGANIZATION AND STRUCTURE

Organizing the Parent Annual Fund is critical to success. The role of the administrator and development council leadership (if available) is to recruit lay leadership for the Parent Phase of the Annual Fund. The creation and formation of a Parent Annual Fund Committee will be the result of this important groundwork of recruiting parent leaders.

The ideal committee structure would include the following: CHAIRPERSON/CHAIR-
COUPLE, GIFTS COMMITTEE, COMMUNICATIONS/PR COMMITTEE,
EVENTSCOMMITTEE, OPERATIONS/MANAGEMENT COMMITTEE. Listed below are
suggested job descriptions for each. Feel free to download these job descriptions off of our
website at www.codesweb.com.

CHAIRPERSON OR CHAIRCOUPLE

- Recruits chairpersons to serve on Parent Annual Fund Committee.
- Chairs general/report meetings; creates Annual Fund timeline.
- Makes first parent pledge to the Annual Fund (should be in the range of \$500-- \$1,000 minimum pledged during the year).
- "drives" the overall campaign along with administrator or development staff.
- closely monitors and works with Gifts Committee on major gift calls and the phonathon.
- assists subcommittees where needed.
- makes sure committee members make their own gifts.

GIFTS COMMITTEE

- Make personal calls on 10-12 donors who can give \$5,000+.
- Makes their own pledges first.
- Seeks early gifts for Kickoff/Announcement.
- Identifies Major Prospective Donors.
- Determines gift goals.
- Make contacts sends out appointments letters; sets appointments.
- Sets report meetings.
- Makes sure personal calls are made.
- Recruits phonathon chairperson
- Conducts phonathon (see +*Quarterly*+ September 1999 "No Nonsense Phonathons").
- Procures phonathon location.
- Creates phonathon timeline.
- Develops phonathon script.
- Creates phonathon materials
- Builds phonathon orientation packet and procedures for phone callers.
- Implements training program for callers.

EVENTS COMMITTEE

- Plans Kick Off and/or Victory Celebrations in order to:
- Build momentum and enthusiasm for the Annual Fund.
- Tell the story and build the case.
- Get letters of endorsement.
- Build relationships.
- Recruits Host Couples.
- Schedule facilities or home for each event.
- Develop invitation list and printed invitation.
- Recruit calling committee to encourage attendance.
- Designs decorations and amenities theme.
- Organizes Liturgy.
- RSVPs.

COMMUNICATIONS AND PUBLICITY COMMITTEE

- Designs overall promotion plan.
- Organizes new parent orientation gathering at beginning of school year.
- Annual Fund Brochure (call us at 1-800-426-8198 to order Annual Fund brochures).
- Develops Printed Materials.
- Assigns Hot line/questions person for ALL donor questions, objections and concerns.
- Coordinates direct mail plan.
- Selected/personalized gift request letters
- Training party event
- Communicates employees matching gifts program to parents and other donors.
- Distributes donor update/newsletter

OPERATION/MANAGEMENT COMMITTEE

- Updates previous donor lists.
 - Edits current parent lists.
 - Conducts database analysis for accuracy, duplicate records, etc.
 - Inputs new database entries.
 - Compiles mailing components: personalized letters, labels (if not printed envelopes), envelopes, brochures, reply envelopes, "matching gift" brochures.
 - Coordinates mailings.
 - Reviews personalized gift request letters.
 - Creates pledge form.
 - Oversees pledge management plan and pledge fulfillment.
 - Reporting/updates
 - Rolling donor Honor Roll
 - Resolves software/hardware issues.
 - Addresses overall management issues.
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