

# Institutional Advancement: A Focused Plan for the Future



ST. MARY'S PARISH SCHOOL, MOSCOW, IDAHO

# St. Mary's Parish School

## ► Our Mission

- St. Mary's **Parish's** Mission Statement "is to extend the Kingdom of God through our church community by growing in faith, love and service".
- St. Mary's **Parish School** exists as a vital part of the parish's ministry to support families in the total education of their children. Its goal is to encourage and challenge our students to grow tangibly in their relationship with God, as they strive to be life-long learners. We encourage our students to endeavor to achieve their highest personal and academic potential.
- Our school serves as an evangelization arm for the parish. In working with students, with parents and community, we encourage and support families to live their faith fully.

## Our Vision

- **The Vision We Have for each student:**  
***Imagine your child...***  
Increasing in respectfulness, resourcefulness and responsibility  
Focusing on God's loving presence  
Being guided by devoted and professional teachers  
Being equipped to excel and growing in confidence  
Becoming dream makers and world changers....  
***Changing the world...***

# Relationship between school, parish, and Diocese



Diocese of  
Boise



St. Mary's  
Parish

St. Mary's  
Parish School



# Uniqueness of This Elementary School:

## Founded 1908

- ▶ Continuous involvement of the Ursulines since they founded the school in 1908.
- ▶ Has met the needs of the times throughout its history.
- ▶ In 1956 sold to the St. Mary's Parish
- ▶ Currently 112 students in 3-year-old through 8<sup>th</sup> grade

## St. Mary's School Foundation

- ▶ Founded 1982
- ▶ Instrumental people making it happen:
  - ▶ Mrs. Peggy Quesnell
  - ▶ Mr. Bart Quesnell
- ▶ Started with about \$30,000
- ▶ Current corpus: \$2,200,000
- ▶ Goal: \$10,000,000

# St. Mary's School Foundation

**St. Mary's School Foundation Members oversees a perpetual endowment fund (501 c 3 under the State of Idaho) that was established in 1982 to assist the school with its yearly budget by providing interest earned (5%) on invested (local) funds.**

**St. Mary's Foundation Goal: to provide long-term financial support through the development of an Endowment Fund that will provide 50% of the school's operating budget.**

## Administrative Structures

**St. Mary's Parish School** is a "Pastor/Principal Model"

**St. Mary's School Foundation** has its own board comprised of investment, financial, and development members who have a heart for a non-profit foundation.





Ongoing Goal:



To build and grow relationships between the school and its varied stakeholders and community to the school mission and vision.



# The Focus:



**We ALL must focus on engagement to mission to attract and retain donors.**



# Typical Year

## School Foundation

- ▶ School Foundation Annual Appeal
- ▶ School Foundation Wills/Estates
- ▶ Increase corpus to \$10,000,000



## St. Mary's Parish School

- ▶ Fundraising
  - ▶ Jog-a-thon
  - ▶ Christmas tree sales
  - ▶ Annual Auction
- ▶ Direct Giving
- ▶ Grants
- ▶ St. Mary's Parish Subsidy

# Delineation of work:

## School

- ▶ Annual Appeal (December)
  - ▶ This year CARES Act
  - ▶ Video message/professional email
  - ▶ Second appeal February/March
- ▶ Spring celebration and auction (class projects/quilts, auction off experiences....)

## Foundation

- ▶ Develop Top 20 Prospect List
- ▶ Approaches Major Donors
- ▶ Annual Appeal and Gifts
- ▶ Planned Giving: Wills/Estates

# COVID YEAR 2020-2021

## St. Mary's Parish School

- ▶ Fundraising
  - ▶ Jog-a-thon (\$27,000)
  - ▶ Christmas tree sales ( ?? )
- ▶ Direct Giving (ahead this time compared to last year)
- ▶ Grants (\$25,000 CARES Childcare)
- ▶ St. Mary's Parish Subsidy (\$60,000)

## Immediate Needs

- ▶ **Replacement of income from Annual Auction** (Need \$80,000).
- ▶ Develop Annual Plan Template
- ▶ December 2020 CARES act 100% Donation video with email
  - ▶ Evaluate December giving for next
  - ▶ Eg. Feb. 300 X \$200.00
  - ▶ End of year celebration/online auction

# This year (2020-2021):

## Compile Donor Lists

- ▶ Individuals List
- ▶ Business List
- ▶ Capital campaign List
- ▶ Auction last 5 years
- ▶ Foundation List
- ▶ Present parent List
- ▶ Alumni List
- ▶ Grandparent's List

## Processes

### **St. Mary's School Foundation**

- ▶ Annual Appeal Letter (sent our Dec.)
- ▶ Develop top 20 prospect list (set aside for the School Foundation)
- ▶ Board to meet personally with each prospective donor



# Processes Continued:

## **St. Mary's Parish School**

- November 2021: Set-up committee for development work.
  - Developed sub-committee for prospect lists.
- December 2021: Develop top 20 prospect list, second, and third tier lists from each of the lists
- Develop and record 90 second video about mission/values and how their donation would benefit the children.
- Send out professional email with video to donor lists.
- Send out email to parents about CARES 100% donation if donation made by December 31, 2020.
- Review December appeal and make plans for spring development work

# Communication

- ▶ Connect communications more directly on website.
- ▶ Thank businesses for support over the years
  - ▶ Explain annual auction is postponed this year and would they consider a donation this year.
- ▶ Assist parents what/how to cover income from auction
  - ▶ Provide basic financial information about fundraising and plans to cover the needed funds relative to postponing the auction.

# St. Mary's Parish School Long Term Focus

## **Broad Categories:**

- ▶ Develop Alumni Relations Program
- ▶ Annual Giving – School
- ▶ Development Plan: Technology, Capitol Planning
- ▶ Giving Day
- ▶ Fundraisers: Jog-A-Thon, Christmas Tree Sales, Annual Auction with a major focus on building community and relationships.

# Alumni Relations

- ▶ Develop alumni lists: Current addresses, phone numbers, email
- ▶ Develop alumni page within the school website
- ▶ Set-up a button to give directly to the school
- ▶ HS senior graduates senior luncheon with St. Mary's 8<sup>th</sup> grade graduates
- ▶ Encourage 8<sup>th</sup> graders to give \$10/year to School Foundation throughout HS.
- ▶ Find an alumni interested in helping build the alumni page: link the school Facebook page to the alumni page
- ▶ Send newsletters to alumni over email.



# Giving Days

- ▶ Use Volunteers to promote the “giving Day” on their Facebook page.
- ▶ Send out the information on social media.
- ▶ Encourage people to donate, contact friends to donate, and contact relatives, especially grandparents.
- ▶ Develop a Grandparent’s list from the Grandparent’s Day in the school, May each year.

# Developing working committees

- ▶ Have a Board member serve as chair of your institutional advancement committee.
- ▶ Develop sub-committee “Development” (Board member as chair)
  - ▶ Seek individuals with interest and expertise to serve
- ▶ Fundraising committees with a Board member representative
  - ▶ Jog-A-Thon
  - ▶ Christmas Tree Sales
  - ▶ Annual Dinner/Auction

# Development Efforts

## ► Technology Plan

- Develop Five-year plan: Rotation of computers, smartboards, docucams, Chromebooks.
- Connection to fiber optics
- E-Rate application

## ► Facilities Plan

- Develop 15-year plan: replacement of boiler, refinish gymnasium floor, replacement of roof (currently at 15 years old), repainting inside/outside.
- Grounds work, pave faculty parking lot, refresh main paved parking lot.



# St. Mary's School Foundation Long-Term:

## Focus on:

- ▶ Annual appeal with top 20-30 prospects – multiple year donations.
- ▶ Planned Giving – wills/estates
- ▶ Help current and past parents understand the Foundations' purpose and long term goals.

**The Goal \$10,000,000 within the next five years.**





## The Major Key:

**FUND THE ST. MARY'S  
SCHOOL FOUNDATION.**

WHEN \$10,000,000 IS IN  
CORPUS, THE SALARIES  
AND BENEFITS OF  
TEACHERS AND STAFF WILL  
BE COVERED.

**TUITION WILL DROP  
SIGNIFICANTLY.**



ST. MARY'S PARISH  
SCHOOL

A WAY OF LIFE.....

