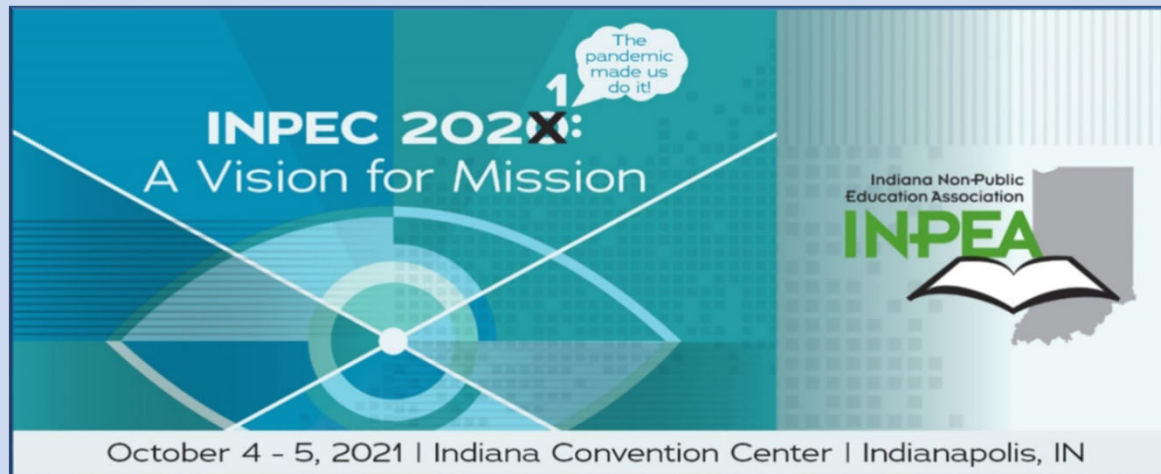


# BANKING ON YOUR BOARD



OCTOBER 4, 2021

CATHOLIC  
SCHOOL  
MANAGEMENT

Strategy



Planning



Leadership

Mary J. Foley  
Catholic School Management  
a division of Christian Brothers Services



**THANK  
YOU!**

# Christian Brothers Services

- ◆ Employee/Religious Health Plans
- ◆ Employee Retirement Plans
- ◆ Property/Liability/Student Accident
  
- ◆ IT Consulting/Website
- ◆ Catholic School Management
- ◆ BMT Financial Services
- ◆ Mission Advancement

*“Never say no...”*

## MISSION

*Christian Brothers Services exemplifies the Lasallian tradition by understanding the needs of our members, protecting the human and financial resources of institutions, and guiding member organizations in finding practical solutions to business needs.*

# Catholic School Management

## ◆ Strategy

- ◆ School and Program Assessments, Enrollment Management, Marketing, Advancement, Alumni, Mission Clarification, Visioning, Feasibility Studies, Capital Campaigns

## ◆ Planning

- ◆ Strategic Plans, Plans for Technology, Annual Fund, Development, Marketing, Communication, Social Media, Recruitment/Admissions/Retention

## ◆ Leadership

- ◆ Workshops, Seminars, Webinars, Board Training, Mentoring, Publications, Retreat Facilitation, Keynote Presentations, Governance, Administrative Structure, Search

# If It's Free, It's For Me!

## Resources

- ◆ *Catholic School Management Letter*
- ◆ *Scholarships*
- ◆ *Webinars*
- ◆ *Articles*
- ◆ *Positions*

- ◆ [www.cbsservice.org/csm](http://www.cbsservice.org/csm)
- ◆ [CSML Sign Up](#)
- ◆ [CSML Details](#)
- ◆ *Recent Topics*
  - ◆ *Teacher Recruitment*
  - ◆ *Please Don't Break the Kids!*





## Portsmouth Abbey School

Portsmouth, Rhode Island



### Head of School Search

Portsmouth Abbey School, located on the beautiful shore of Narragansett Bay in Rhode Island, is seeking its next Head of School to carry forth its Benedictine heritage and commitment to academic excellence in the Catholic tradition.

*Excellence in Faith, Education and Community Since 1926*



## St. Anastasia Catholic School

Pre-K through 8th Grade / Waukegan, Illinois

### Principal Search

*St. Anastasia School is seeking a passionate education and faith leader to continue its journey of excellence as it prepares to celebrate its centennial and the next 100 years. St. Anastasia is a beloved school populated with dedicated and caring faculty, staff, students, parents and benefactors eager to support a visionary and committed principal.*

*The school anticipates launching a strategic planning process in 2022/23 in order to incorporate the next principal's expertise, insight and wisdom.*

# Banking On Your Board Board Litmus Test

It would be  
DEVASTATING!

# Mission Ambassadors

- ◆ Objectives
  - ◆ Awareness
  - ◆ Fundraising
  - ◆ Participation
  - ◆ Engagement
  - ◆ Volunteer Enlistment
  - ◆ Appreciation
  
  - ◆ *What Else?*
  - ◆ **Begin with the End in Mind...**
- ◆ Encounters
  - ◆ Invitations
  - ◆ Introductions
  - ◆ Outreach
  
  - ◆ **Witness**
  - ◆ **Proclaim**
  - ◆ **Engage**
  - ◆ **Invite**
  - ◆ **Transform**



# Resources

- ◆ Value Proposition
- ◆ 30 Second Commercial
- ◆ Elevator Speech
- ◆ Three Points
- ◆ Slogan, Motto
- ◆ Website
- ◆ News, Press Releases, Parent Communication
- ◆ Mission
- ◆ Vision
- ◆ Philosophy
- ◆ Parking Lot Brigade
- ◆ What's Ready?

# Art and Science of Strategic Conversations

- ◆ Everyone's on *Our* Advancement Team
- ◆ Story Telling
  
- ◆ We All Have Our Gifts
- ◆ Expectations – Stated, Written
- ◆ Training, Formation
- ◆ Follow Up
  
- ◆ Carpe Diem!



# Strategic Conversations

- ◆ Selection, Passion, Intention
- ◆ Opportunities
  - ◆ Informal/Unanticipated
  - ◆ Intentional/Casual Reference
  - ◆ Structured/Objectives
- ◆ Preparation
- ◆ For Example...

*“I’d be happy to talk up our school... if they’d just tell me what to say.”*



# Endless Possibilities

- ◆ Work
- ◆ School
- ◆ Boards
- ◆ Store
- ◆ Places of Worship
- ◆ Errands
- ◆ Neighborhood
- ◆ Parties
- ◆ Car
- ◆ Attire
- ◆ House
- ◆ Holiday Cards
- ◆ Parties
- ◆ Book Club
- ◆ In Lieu of...
- ◆ Gifts
  - ◆ Honor
  - ◆ Memory
  - ◆ Memorabilia
- ◆ Auction Items
- ◆ Seeking Names
- ◆ Email Signature
- ◆ Being of Service
- ◆ Annual Fund
- ◆ Notes, Emails
- ◆ Challenge
- ◆ Thank You via...
- ◆ Foundations/  
Corporations
- ◆ Intro Notes/  
Calls
- ◆ Bring to Event
- ◆ Bring to Meeting
- ◆ Arrange or Host  
Meeting/Meal



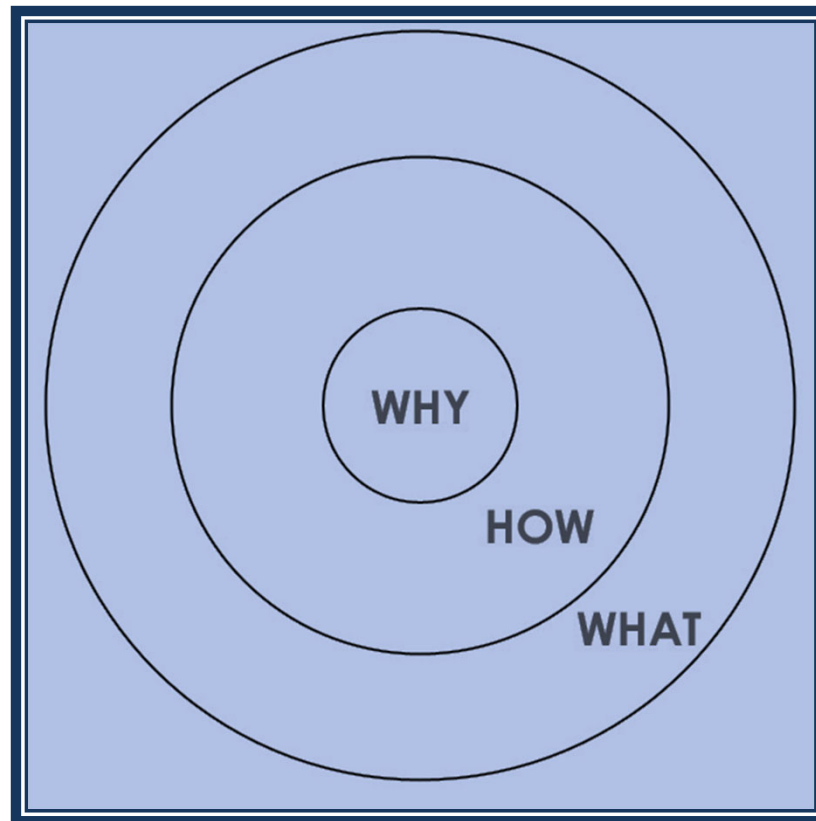
*So you're at this cocktail party...*

# What's New? So Glad You Asked!

- ◆ We just...
- ◆ Did you hear about...
- ◆ Thanks for your...
- ◆ We just received a bequest...
- ◆ Why don't you join us...
- ◆ Last week our...
- ◆ Do you know Steve...
- ◆ We're planning a...
- ◆ Our staff recently...
- ◆ Big news! We...
- ◆ Did you attend...
- ◆ Since you're interested in...
- ◆ Have you thought of commemorating...

FOR  
EXAMPLE

# Start With Why





# Ambassador Hurdles

- ◆ Objection Response Steps
- ◆ Evolution vs Revolution
- ◆ Recognition, Appreciation
- ◆ Easy Launch
  
- ◆ I don't know anyone \_\_\_\_\_
- ◆ I'm not comfortable \_\_\_\_\_
- ◆ It's not appropriate for me to \_\_\_\_\_
- ◆ I'd rather \_\_\_\_\_

# Relationships / Networks

- ◆ Personal
  - ◆ Professional
  - ◆ Civic
  - ◆ Religious
  - ◆ Neighborhood
  - ◆ Friends
  - ◆ Volunteer
  - ◆ Social
  - ◆ Vendors
  - ◆ Colleagues
  - ◆ Other
- ◆ In other words...
  - ◆ For example...
  - ◆ Not everyone is destined...



# Staying Connected

- ◆ Note, Letter, Card, Text, Email, Call
- ◆ Event Invitations – Before, With, After
- ◆ Follow Up on Requested Material
- ◆ Email with Link for Website Item or Video
- ◆ Note with Article of Interest
- ◆ Milestones/Accomplishments/Announcements
- ◆ Unique Offerings/Did You Know?
- ◆ Strategic Initiatives Update

# RULE OF THIRDS

# More than Promotion

- ◆ School
- ◆ Advancement
- ◆ Faith

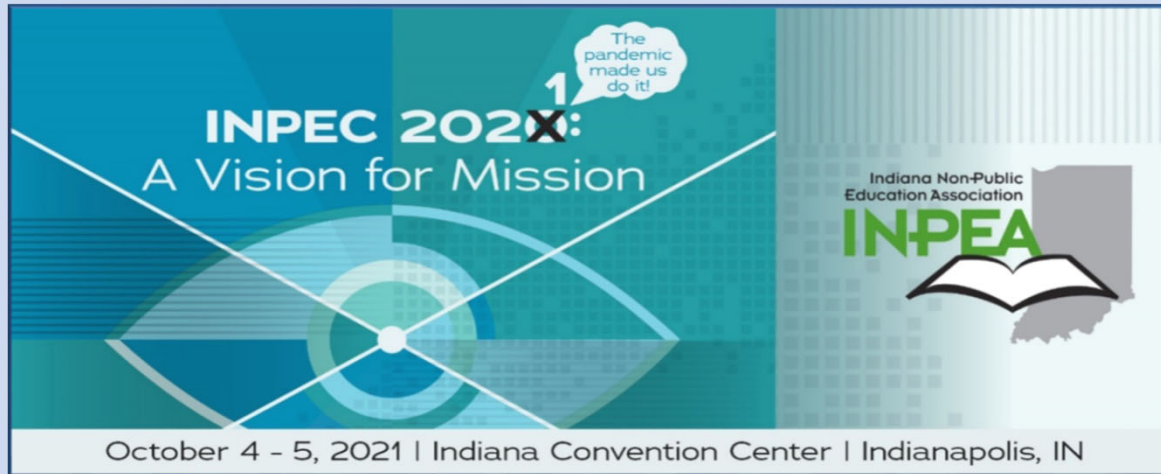
*“A primary purpose of the mission of Jesus is not only the maintenance of existing structures and programs, but to be caught up in a sense of mission, an experience of evangelization.”*

Archbishop Thomas Murphy  
*The Theology of Fundraising*

Q & A

# Annual Fund

## *Moving It to the Next Level*



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# Wrap Up

- ◆ 88 Days
- ◆ Webinar October 14  
[https://www.cbsservices.org/webinars\\_upcoming.php](https://www.cbsservices.org/webinars_upcoming.php)
- ◆ *Catholic School Management Letter*
- ◆ Archives
- ◆ Each Other!





*“From the perspective of the Gospel, fundraising is not a response to a crisis. Fundraising is, first and foremost, a form of ministry. It is a way of announcing our vision and inviting other people into our mission.”*

**Henri Nouwen**



**THANK  
YOU!**

# For More Information

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