

A Three-Part Advancement Project for Blessed Trinity Catholic School

Sue Kerr, Principal
Blessed Trinity Catholic
Richfield, Minnesota
612.869.5200
kerrs@btcsmn.org
July 2009 – July 2010

Project Summary

This advancement project was designed to meet immediate needs for tuition assistance; to market our school with an eye toward retaining current students and recruiting new students; and to build relationships with donors able to make substantial long-term gifts to Blessed Trinity. While this one-year project was intended to meet immediate needs, it was carried out in cooperation with a newly hired development director with the intention to create a long-range advancement plan based on the results.

Goals and Results

Goal One: Initiate a campaign to meet immediate needs for tuition assistance

- We kicked off a new campaign called “Difference Makers” with a goal to raise \$50,000 by asking for \$1000 donations. Our first donation was a \$20,000 matching grant, and in all, the “Difference Makers” campaign raised over \$50,000 to help us meet the needs of our poor families for tuition assistance.

Goal Two: Market the school for retaining and recruiting students

- A public relations committee was formed which included the development director, principal, school parents with marketing experience, and the admissions director at our neighboring Catholic high school. As a result of the committee’s discussions, analysis of present efforts, and research of best practices, the following recommendations were made: Improve the current round-ups and open houses; increase our advertising presence; do a direct mailing to targeted households; and order banners to appeal to commuters along the highly traveled streets near our two campuses.

Goal Three: Build relationships with donors able to make substantial gifts

- A spreadsheet was created and given to the three parish priests asking them to list people who are known to support Catholic education and to give us some idea of their giving capacity. We held a legacy luncheon and invited stakeholders from our boards and our donor lists. We gave tours of both buildings and had a brief informational session before serving lunch. We did not ask for donations, but used the meeting as a chance to get to know one another and to share our mission.

Project Overview

Blessed Trinity Catholic School is located in Richfield, Minnesota, a first ring suburb of Minneapolis. Richfield has seen a change in demographics in the past five to seven years with an influx of immigrants from Mexico and other Latin American countries. Blessed Trinity has begun to experience these demographic changes as well and we have had to make adjustments to allow us to serve this new population of Catholics who desire a Catholic education for their children, but who cannot afford to pay much toward tuition. Meeting the needs of poor, English language learners has put a financial strain on our school and three supporting parishes. Our faculty has had to learn new ways to differentiate instruction to meet increasingly diverse needs. The wider community has had to become accustomed to this new diversity of culture and ethnicity, language, worship styles, and socio-economics.

These challenges were the driving force behind this project, which is a look at advancement in light of our mission to be a clearly Catholic, intentionally inclusive, and academically excellent school. We must raise funds for tuition assistance; we must retain our current students and recruit new students from an increasingly diverse community; and we must tell our story and promote our mission to a much wider audience.

The first goal of this project was to come up with a campaign to raise \$50,000 for tuition assistance that would appeal to various stakeholders. The development director and I considered many options, and settled on asking 50 people for \$1000. We discussed many different avenues for making the appeal. We decided to call this campaign "Difference Makers" and to kick it off at our 4th annual Grand Gala fundraising event held December 5, 2009. We appealed to some previous supporters for a matching grant to inspire new donors before the kick-off. In November, our development director received an anonymous offer to match the first \$20,000 in donations.

At the Grand Gala, the development director appealed to the attendees by announcing the \$20,000 matching challenge with a rousing speech asking for \$1000 gifts to get the fund growing. By the end of the Gala we were very near the goal of the matching grant.

We continued the "Difference Makers" campaign in our alumni/stake-holder newsletter, Spirited Perspectives, which goes out three times each year. Both the development director and I wrote articles for the newsletter. Mine was written to appeal to the head, focusing on our academic achievements, and hers was written to appeal to the heart, with personal success stories about the opportunities afforded those with a Catholic education.

With donations received through the anonymous matching grant, the Gala attendees, and those who read the newsletter, we surpassed our \$50,000 goal by \$11,000.

Unrelated to our campaign, a prominent Minnesota family donated \$10,000,000 to a consortium of urban Catholic schools that serve the poor (defined as qualifying for free or reduced lunch) specifically for tuition assistance in the amount of \$1,000,000 each year for 10 years. Each school received \$750 per FRL student. For Blessed Trinity this meant an additional \$87,000 in tuition assistance for the 2009-2010 school year, and the promise of similar amounts for the next 9 years. This donation took care of our short-term financial needs, and allowed us to focus on marketing and long-range strategies.

The second goal of the project led us to form a public relations committee to help us identify some areas for growth in marketing our school to retain current families and recruit new students. The group included members of the administrative team, School Board, and parent population with experience or interest in the field of marketing. At our first meeting we examined our current efforts to make Blessed Trinity known to new families and to retain our current families. We discussed ways to improve our preschool/kindergarten round-up and open houses to attract new students, and our move-up/parent information night to help us retain current students.

The suggested improvements for the round-up for new preschool and kindergarten families included increasing curb appeal with a bon-fire and luminaries leading up to the school entrance. (This event is held in January when the grounds look drab and the idea was to make a positive impression even as people were getting out of their cars.) It was also recommended that students be present as greeters and tour guides. We also brainstormed about what we wanted people to be thinking as they left and then created talk points to ensure that everyone would have a clear, consistent message.

The format of the evening was revamped to include time for new families to hear from some current families, current and past students, and teachers. We also created information stations with the topics, transportation, financial aid, uniforms and extended day.

Two weeks before the event, the PR committee did a walk through of the campus to pinpoint areas that would be considered “must-see”; some areas that could be quickly spruced up; and some areas to avoid altogether. The administration discussed the best ways to utilize the gifts and talents of the teachers to make sure they would be comfortable in the role they were assigned that evening.

The thought and preparation paid off. The place looked great, the teachers were well prepared, the students were a wonderful addition, and there was a feeling of urgency to get registered. Many families wanted to sign up that night, and we had enough staff on hand to assist them with the paperwork.

Similar updates and improvements were made to our move-up/parent information night for parents of third graders (whose children go to another campus for fourth

through eighth grade) and fifth graders (who will be making the move to middle school) as these are transitional years where we traditionally see attrition.

The next task given the PR committee was to make recommendations to increase our advertising presence. Blessed Trinity was chosen to represent the mission of Catholic education in the Archdiocese and was featured in a video that was shown in every Catholic parish in the Archdiocese of St. Paul and Minneapolis the last week of January. The committee was asked to come up with some ways to keep Blessed Trinity in the eyes and on the minds of Catholics after they were shown the video. We followed up that video with newspaper ads, a few television spots, and a direct mailing to families of targeted demographics including preschool and school aged children, certain zip codes, and family income level. Later in the year another mailing was sent.

The last suggestion of the committee was to order banners to appeal to commuters going by our school every day. We did order a banner for each campus that read, "If your children went to school here they'd be in your car by now. "

It is hard to measure the results of these marketing efforts. We did give a survey to new people who came to our events with a questions asking how they heard about us, how we might improve our events, and how likely they were to register (and reasons why or why not). We got very few completed surveys returned and no insight as to the success of our increased advertising efforts. We did feel the events were well attended, and were happy with the look of our new advertisements. The parishes have not yet granted us permission to put up the new banners.

The final goal of this project was to plant seeds for the building of a legacy circle of donors in a position to make substantial contributions to Blessed Trinity. I produced a table for collecting information from the parishes about some possible donors. I asked our three priests to make suggestions and to give me some background information as to why that person might support Catholic education and their giving capacity. Only one of the parishes cooperated with that request.

A legacy luncheon was planned and School Board and Corporate Board members, were invited along with a few possible donors. We gave them a tour of each campus so they could see the students and teachers in action, and finished with a brief informational session and lunch. We did not solicit any donations at the luncheon, but rather saw it as a time to build relationships. We did get positive feedback and plan to continue to do the legacy lunch. We are also looking at ways to involve some of these possible donors with hands-on volunteering at the school such as tutoring.

What I Learned

What became apparent to me immediately was that advancement takes a lot of time and manpower. I was very grateful to have the cooperation of our part-time development director and communications director. We worked as a team to plan and implement the project from the start. I know I wouldn't have the time necessary to devote to marketing and development that were needed to get these

initiatives off the ground by myself. I also found it is important to have a clear picture of the skill sets of each individual on the team. Our development director is very creative and understands the importance of making things look good. The communications director, even though she works for the school on a very part-time basis, worked to get the advertising information to the right people at the right time.

Besides working with my own team, I got some great ideas along the way by reading some articles on marketing and by consulting with Rob Thomas. A few ideas that I will work on next year:

- Additional events similar to the legacy luncheon where we can get our message and mission out to more people who might be in a position to help us some way—monetarily or with time or expertise.
- A networking event to allow school and parish families who have businesses, products, or services to share their information and get to know about one another.
- Getting focus groups together of parents who work for some large corporations near our two campuses to explore making our school known to their colleagues.

This one-year project impressed on me the importance of a long-range strategic plan for advancement at Blessed Trinity. Working through these initiatives gave me a chance to see how our newly formed team best works together, hope for a great future and confidence in our ability to build a strong long range plan.

I firmly believe in the mission of Blessed Trinity to be clearly Catholic, intentionally inclusive, and academically excellent. I feel we are living out our Gospel values by reaching out to the poor and doing the hard work it takes to raise the funds to serve them. I also stand firm in the belief that where God guides, He provides.