

VAN LUNEN SCHOOL PROJECT: CREATING A DEVELOPMENT PLAN FOR ST.
PETER'S CATHOLIC SCHOOL

by

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Background

St. Peter's Catholic School is a Pk-6 grade Catholic elementary school located in Forest Lake, MN. St. Peter's serves 350 students and is part of the St. Peter's Catholic Church community. St. Peter's relies on tuition, parish subsidy, and fundraising/donations to pay for the operation of the school. Being part of parish, the pastor requires that the school maintains a balanced budget but keeps tuition affordable. In order to continue to keep tuition affordable, St. Peter's needs to develop other sources of revenue and create opportunities to increase revenue.

During the Spring of 2008, St. Peter's Catholic School decided to hire a Development Director to assist in marketing the school, increasing outside fundraising sources, increasing our School Endowment and meeting our funding goals, managing our current fundraising initiatives, engaging the St. Peter's alumni, and preparing for our school's 50th Anniversary. The development director has experience in marketing, planning, and some types fundraising but has never worked formally in development so St. Peter's needed to create a development plan to guide the work of the development director.

School Project and Goals

After reviewing all the needs of the school, St. Peter's decided to focus their school project on creating a development plan to assist in giving direction to their development initiatives. The goals of this project were to create a develop plan that outlines current and future development initiatives, solicits new revenue sources, and create alumni outreach. Below outlines the steps St. Peter's took to create their development plan.

Neither the principal or development director had experience in creating this type of plan so they looked for help from the University of St. Thomas' School of Business Nonprofit Management program focusing on finance. This program offers 13 courses on nonprofit finance especially creating a development plan. The principal and development director took this class on creating a development plan in May of 2009. This one day course taught by an expert in nonprofit development helped to St. Peter's write the plan and to know who to involve in creating the plan.

After learning how to write a development plan, the development director met with the marketing and development committee to review our current development initiatives. These initiatives were written into the plan. The next step was review the direction St. Peter's wants their development plan to take. This included the initiatives St. Peter's had already started in order to make the plan come to life. After reviewing these initiatives, they were made part of the development plan. Finally, a draft of the plan was presented to the principal and the School Advisory Board for review.

Project Results

The school project of creating a develop plan resulted in many accomplishments. St. Peter's redesigned our website as a result of creating the development plan. St. Peter's needed a way to reach our alumni and community as well as educate them on the various means of supporting the school. A redesigned website that is user friendly with new alumni and fundraising page will helped them reach this goal.

In addition, St. Peter's has had a school endowment since the 1990s but never worked to increase the balance and in 2006, it had \$32,000 in it. Since 2006, St. Peter's has increased the

fund to \$150,000 but would like to grow it to \$2 million by 2012. As part of this process, St. Peter's wanted to include increasing the fund balance of the endowment in the development plan. In November of 2008, St. Peter's held an informational meeting about the endowment with 50 alumni, parishioners, and school parents. The goal of the meeting was to educate them about the endowment and get feedback from them about how to grow the fund balance. The response was tremendous and the feedback extremely helpful. From this meeting St. Peter's was able to develop an endowment plan as part of the development plan (See School Endowment Plan).

The school project also resulted in St. Peter's adding alumni outreach to the development plan focusing on an alumni newsletter and website page (See Alumni Communication Plan). Closely tied to the alumni outreach is developing a plan for the school's 50th Anniversary in the fall of 2011 (See 50th Anniversary Plan). Both of these plans are essential parts of the development plan as they lay the foundation for financial gifts from alumni in the future.

Finally, in the St. Peter's development plan they were able to identify alternate sources of income. In addition St. Peter's was able to move some of these initiatives forward. They began the SCRIP Tuition Credit program in November 2008, to offer store cards for gas and groceries as well as other items and getting a rebate for the families and school. This program has brought in about \$6,000.00 to the school for tuition assistance and \$500 for families to apply to their own tuition. In June of 2009, St. Peter's teamed with a local charity's Cars with a Heart program where St. Peter's receives a percentage of the sale of cars donated in St. Peter's name to the organization. St. Peter's also embarked in granting as another alternate source of income.

Lessoned Learned

Creating a development plan takes time and seeing the rewards of development are slow. First, using local experts is extremely valuable. They will assist you throughout the process and provide templates as well as examples to help you create the plan. St. Peter's was able to use the nonprofit finance program found at a local university as a resource. This program was invaluable in helping them create the development plan. St. Peter's also found an alumnus who writes grants for local districts and he is assisting them in writing grants.

Another lesson learned by St. Peter's was that administrators cannot do this by themselves. Using the marketing and development committees along with hiring a development director was essential in creating this plan. Administrators are able to complete their other duties and devote the appropriate time to development. These groups helped in outlining the plan and the development director is responsible carry them out.

Development initiatives take time to implement and reap the rewards from the relationships built. Therefore, it is important to celebrate the small success. For St. Peter's those successes this year were the new website, adding the SCRIP and Cars with a Heart program, the excitement and feedback from the endowment meeting, and creating a plan knowing that it will change. St. Peter's celebrated these successes.

Conclusion

This development plan is a beginning point to focus the efforts of finding other revenue for St. Peter's. In addition to focusing their fundraising efforts, the development plan will serve as a great tool to evaluate their development program. Finally, St. Peter's is aware that this plan will evolve over time as the objectives change and some initiatives are discarded.

Appendixes

Current and Future Development Initiatives

School Endowment Plan

Additional Initiatives

Alumni Communication Plan

50th Anniversary Plan