

PARTNERS IN MISSION PRESENTS

# THE NATIONAL ADVANCEMENT SUMMER INSTITUTE FOR CATHOLIC SCHOOLS™

BOOK TODAY! Last Conference Sold Out Before May 1

BOSTON, MA • JUNE 20-24, 2021

TWO GREAT CONFERENCES: SELECT ONE, LEARN FROM BOTH AMERICA'S PREMIER ADVANCEMENT EXPERIENCE FOR CATHOLIC SCHOOLS

**#PIMSI** 





Taste of Boston Reception, Boston Harbor Cruise, Celebrate Catholic Education Dance Party with Hip Pocket Orchestra, and Trolley Tour are included with Registration



We are working hard to plan a safe, in-person event in Boston. We will follow CDC guidelines and provide safety protocols consistent with their recommendations, including Partners in Mission masks.

The National Advancement Summer Institute for Catholic Schools $^{\text{TM}}$  will be offered virtually if we are not able to convene in June.

Either way, we will be presenting strategic, resultsoriented, proven strategies at our high energy conference!

### **Strategic Partners:**











**boost**my**school** 







# THE NATIONAL ENROLLMENT MANAGEMENT CONFERENCE FOR CATHOLIC SCHOOLS™

### TOPICS INCLUDE

- Assessing Your Inquiry/Response System
- Communications Personal, Print, Media, Web
- Engaging Faculty in Recruiting and Retention
- Engaging Your Parents in Admissions
- Expanding Your Applicant Pool
- Facebook, Twitter and More: Social Media Strategies
- Customer Service and Marketing Plans That Work
- · Open Houses
- Positioning/Competing with Other Catholic Schools
- President/Principal Role in Enrollment Management
- · Recruitment and Retention Plans
- · Recruitment of Non-Catholics
- Retention Strategies
- · Social Media in Admissions
- Student Shadow Programs
- Using Technology in Admissions
- Welcoming/Engaging Newly Accepted Families
- Your School from the Customer's Perspective

### WHO SHOULD ATTEND

- Superintendents and Diocesan Leadership Teams
- Presidents, Principals, Assistant Principals
- · Pastors and Heads of School
- Administrative Teams
- Directors of Admissions, Recruitment, Advancement, Communications, Marketing, Athletics, Enrollment Coordinators
- Religious Community Leaders
- Board Members
- Business Managers

### WHY ATTEND

- · Catholic, Mission-Centered
- Experience and Success Dedicated Exclusively to Catholic Education
- Strategic Solutions for Catholic Schools
- Varied and Targeted Topics
- Instant Network of Friends and Colleagues
- · It's About the Experience
- Ask Any of Our Alumni
- Comprehensive Conference Resource (available for an extra charge)
- · Enrollment Plan to Take Home

### ACQUIRE THE TECHNIQUES, TOOLS AND STRATEGIES TO MAKE AN IMMEDIATE IMPACT IN YOUR SCHOOL'S ADMISSIONS

**EFFORT.** Offering proven strategies exclusively for Catholic schools, this conference is tailored for enrollment professionals to ensure sustainability, affordability and accessibility. In depth presentations will explore the strategy of Enrollment Management — moving prospective students through the enrollment management funnel from inquiry to graduation and everything in between.





### THE NATIONAL ENROLLMENT MANAGEMENT CONFERENCE™ FOR CATHOLIC SCHOOLS SCHEDULE

SUNDAY, JUNE 20

Registration 3:00 to 7:00 p.m.

Opening Mass 6:00 p.m.

"Taste of New England" Welcome Reception

7:00 p.m.

MONDAY, JUNE 21

DAILY LITURGY

Enrollment Management 101: "Success is in the Science"

### Branding = Identity

 Being a Difference Maker: How to Revive Your Brand with a New Life

### General Marketing = <u>Attention</u>

- Developing Marketing Strategies to Meet Goals
- Communications: Personal, Print, Media, Web
- Budgeting / Justifying ExpendituresTelling Your Story
- Telling roar se

— LUNCH —

AFTERNOON THEME

- Target Marketing = <u>Attraction</u>

  Crafting Your Message for Your Intended
- It's Just Me, Myself, and I: The Effective
   One Person Admissions Office

TUESDAY, JUNE 22

DAILY LITURGY

MORNING THEM

### Micro Marketing = Relationship

- Establishing a Connection: Securing Your Place in the Prospect's Mind
- Creating Affordable and Timely Pieces
- LUNCH —

AFTERNOON THEME

### Recruitment = Action

- · Event-Driven Recruitment
- The Role of the President/Principal in Recruitment
- Cultivating Prospects: Turn "Shoppers" into "Buyers"
- Be Our Guest: Guest-Centered Recruitment
- · Five Steps to Increasing your Enrollment
- Building the Relationship via Information Nights, Open Houses, School Tours, and Student Shadow Programs
- Know the Competition: Strategies to Differentiate
- · Making an Impact with Social Media
- Student Recruiting during a Pandemic

WEDNESDAY, JUNE 23

DAILY LITURGY

— BREAKFAST —

### MORNING THEME

### Application = <u>Interest</u>

- The Role of Enrollment Management in Advancement
- The Application: Asking ALL the Right Questions
- Enrollment by the Numbers: Setting Goals-Tracking Results
- Data Drives Strategy: Collection and Implementation
- Attract, Recruit, and Cultivate with Technology Tools
- LUNCH —

AFTERNOON THEME

### Acceptance = <u>Invitation</u>

- Be Our Guest: A Welcoming First
   Impression
- Financial Aid: Maximizing the Return on Investment
- The Role of the President/Principal in Enrollment Management

### Enrollment = Decision

- FIT (Freshmen in Transition): Retention Begins at Enrollment
- Opportunities to Engage Parents at Point of Enrollment
- Linking Your Admissions and Business Office for Success

Trolley Tour of Boston and an Irish Party at The Black Rose

THURSDAY, JUNE 24

DAILY LITURGY

— BREAKFAST —

MORNING THEME

### Retention = <u>Fulfillment</u> • Retention Agents: Faculty and Staff

- Maintaining a Connection: Capturing Those Who Did Not Enroll
- Lessons Learned from an Experienced Admissions Officer
- Ten Things Catholic Schools are doing right to Leverage Affordability and Tuition
   Assistance
- Retaining
- It Takes a Village: Strategic Student Retention

Winning Strategies to Take Home

Closing Prayer and Commissioning Ceremony

Conference Evaluation

Conference concludes at 12 noon



Boston Harbor Cruise

Celebrate Catholic Education Dance
Party with the 10-piece Hip Pocket

— General Sessions and Breakout Sessions including Joint Sessions with the Advancement Conference Attendees –

### THE NATIONAL ADVANCEMENT CONFERENCE FOR CATHOLIC SCHOOLS™

### **TOPICS INCLUDE**

- · Advancement for Presidents and Principals
- · Alumni are Forever: How to Keep Them in the Family
- · Annual Fund: Build from the Ground Up
- Building a Culture of Philanthropy
- · Building Effective Boards for Advancement
- Communications Programs
- Creating the Written Strategic Plan for Advancement
- Donor Stewardship
- · Enhancing Your Annual Report
- Establishing a Major Gift Program
- Social Media Strategies
- Ministry of Advancement
- Planned Giving and Bequests Programs
- Planning for a Successful Capital Campaign
- · Prospect Identification, Cultivation and Solicitation
- Prospect Research
- Role Playing the Ask
- Special Events During and Post-Pandemic
- Strategic Planning
- Volunteer Management/Governance

MONDAY, JUNE 21

of Successful Newbies

· The President and Director of

Advancement Operations

· Changing the Landscape of Philanthropy

· New Advancement Directors: Five Secrets

The Right Team: How Many Do I Need and Who Does What?

Advancement Relationship: Setting

DAILY LITURGY

MORNING THEME

### **EXPERIENCE A STRATEGIC, RESULTS-ORIENTED, HIGH ENERGY**

**CONFERENCE** designed for both novice and seasoned, Catholic school advancement professionals and leaders who want to take their programs and team performance to the next level.

Learn, share, and have fun with friends and colleagues from across America and return home with the wisdom, tools, plans and support you need to advance your program to a whole new level of success. Centered in our faith and the mission of Catholic education, this experience promises renewed energy and rekindled passion for you and your important work in our Catholic schools.

### WHO SHOULD ATTEND

- · Advancement Directors/Alumni Directors
- Presidents and Principals
- **Board Members**
- · Communications Directors
- · Diocesan Education Leaders
- Key Administrators & Volunteers
- Bring your advancement team
- · Best results occur when two or more attend from the same school

### WHY ATTEND

- · 100% Faith and Mission-Centered Focus on Catholic Schools
- All New Sessions Designed for Today's Tough Challenges
- · Personal, Private Time with our Partners to Address Your Issues
- Huge, Comprehensive Take Home Resource Manual (available for an extra charge)
- · A "Best of Boston" Experience

### THE NATIONAL ADVANCEMENT CONFERENCE FOR CATHOLIC SCHOOLS™ SCHEDULE

### SUNDAY, JUNE 20

Registration 3:00 to 7:00 p.m.

Opening Mass 6:00 p.m.

"Taste of New England" Welcome Reception

7:00 p.m.

### — LUNCH — AFTERNOON THEME Annual Fund

Expectations

- · Developing a Leadership Giving Program
- Segmentation Techniques and Strategies
- · Making Leadership Gift Personal Solicitations
- · Using Challenge Gifts and Matching Gifts
- Team Crowdfunding: Bringing Advancement and Extra-Curricular Programs Together
- One Day Giving Campaigns Boston Harbor Cruise

### TUESDAY, JUNE 22

DAILY LITURGY

### MORNING THEME

### Capital Campaigns & Major Gifts

- · Role Playing the Face to Face Ask
- · What It Takes to Get a Mega Gift
- · What Should be in Place Before You Start a Campaign?
- · Is Your Campaign Feasible?
- Cultivating Your Top ProspectsFamily Philanthropy
- LUNCH —

### AFTERNOON THEME

### Planned Giving and Special Events during a Pandemic

- · Build a Legacy Philanthropy Program
- Using Planned Gifts to Build Endowment
- · Stories from the Road (Planned Giving)
- Vehicles to Get You There • Best Tips for Auctions, Legacy Galas
- and Golf Tournaments · Adding New Elements to Your Event Strategy

Celebrate Catholic Education Dance Party with the 10-piece Hip Pocket

### WEDNESDAY, JUNE 23

DAILY LITURGY - BREAKFAST -

### MORNING THEME

### Constituent Relations

- · Social Media Strategic Plan for Engaging Alumni
- · Parent and Grandparent Programs
- Class Agent Programs, Out... Affinity Groups, In
- · Social Networking
- · Alumni Programs
- LUNCH —

### AFTERNOON THEME Communications

- · Brand Management for Your School
- · Persuasive Development Writing · Elements of a "Powerful" Magazine/ Newsletters
- · Rock Your School's Website
- Effective Writing for Advancement Professionals
- · Don't Be Scared of E-Communications

Trolley Tour of Boston and an Irish Party at The Black Rose

### THURSDAY, JUNE 24

### DAILY LITURGY

MORNING THEME

### Stewardship and Volunteer Management

- · 100 Ways to Thank Your Donors
- Engaging Your Board in the Fundraising
- · Identifying, Recruiting and Managing the "Right" Volunteers
- Like It or Not, It's Your Job: The Head and Fundraising

Winning Strategies to Take Home

Closing Prayer and Commissioning Ceremony

Conference Evaluations

Conference concludes at 12 noon



# Partners in Missior

### Partners OUR MISSION

n Mission

Advancement and Leadership
Services for Catholic Education

and inspired by the Spirit, is totally committed to advancing Catholic education by:

- Creating a community of strength for advancement, admission, communication and alumni professionals engaged in this ministry so critical for the future vitality of our Catholic Church
- Advancing excellence in best practices through educational programs and consulting services
- Enhancing professional development through networking and mentoring opportunities.

### HOW WE CAN HELP YOU

- Advancement Program Assessments
- Capital Campaign Feasibility Studies
- Capital Campaign Counsel and Management
- Board and Volunteer Leadership Training
- Major Gifts Counsel
- · Planned Giving Programs
- Communications Counsel

- Strategic PlanningAnnual Fund Programs
- Stewardship
- Constituent Relations Programs
- · Enrollment Management
- Branding
- Marketing
- · Conversion Strategies
- Student Retention
- Student Recruitment











### Accommodations at The Boston Marriott Quincy Hotel

A special conference rate of \$209 per night (single or double occupancy) has been guaranteed at the Boston Marriott Quincy Hotel for rooms booked by May 28, 2021 based on availability. To arrange your stay, please call the hotel at (800) 228-9290 or 617-472-1000.

To learn about the response to the COVID-19 pandemic at Marriott Boston Quincy, visit whattoexpect.marriott.com/bosqu.

REGISTER ONLINE WITH ONLY A FEW CLICKS! www.partnersinmission.com/boston

2021	Con	ference	Registration	Form
Register	Onlin	e: www.pari	tnersinmission.cor	m/boston

Name	Title	
Name	Title	
Name	Title	
Organization		
Address		
City		
Telephone Website Ad	dress	
E-Mail		
	JUNE 20-24 The National Advancement Conference for Catholic Schools	JUNE 20-24 The National Enrollment Managemen Conference for
EARLY BIRD DISCOUNT (EXPIRES MARCH 1)	\$949	\$949
PRE-REGISTRATION (EXPIRES MAY 1)	\$999	\$999
REGULAR REGISTRATION (EXPIRES JUNE 1)	\$1,049	\$1,049
LATE REGISTRATION (AFTER JUNE 1)	\$1,099	\$1,099
EACH ADDITIONAL REGISTRANT	\$919	\$9/19

--- BREAKFAST AND LUNCH INCLUDED ---

If you have questions, call Larry Furey at (781) 710-0242, Ifurey@partnersinmission.com or Chris Hagerty at (814) 566-7500, chagerty@partnersinmission.com. You will receive confirmation upon receipt of your registration form and payment. Final conference information will be sent to you four weeks before the conference and will include full details on the conference's daily schedule and activities. Visit our website for more information: www.partnersinmission.com

Please reserve _	place(s) for
The National A	dvancement Conference
for Catholic Scl	hools™ from June 20-24, 2021

□ Please reserve \_\_\_ place(s) for The National Enrollment Management Conference for Catholic Schools™ from June 20-24, 2021

- □ Please reserve a **Conference Resource Manual for \$99**(Note: all presentations will be available on our MobileApp at the conference. The Conference Resource Manual includes all presentations PLUS 500+ pages of additional best practices and materials).
- ☐ Check enclosed: \$
- Please send me additional information on other Partners in Mission services
- ☐ Pay with credit card: www.partnersinmission.com/boston

Please make checks payable, and mail registration to **Partners in Mission, 124 Sycamore Drive, Westwood, MA 02090**.

### Conference Registration & Fees

The fee includes post-seminar telephone consultation, refreshments, breakfast, lunch, dinner on Sunday and Monday evening and most evening events including event transportation. Accommodations are on your own. A \$400 deposit is required for each individual who registers. Balance will be due 45 days prior to the conference. Register early, as previous conferences have sold out.

### **Refund Policy**

Full refund (less a \$100 administrative fee) if you cancel in writing 30 days prior to the conference. No refund will be made if your cancellation is received within 30 days of the conference. Partners in Mission reserves the right to change, modify or cancel any program or activity.

### Bishop Joseph McFadden Scholarship Opportunities

Scholarships, named in honor of the late Bishop Joseph McFadden, are available to participants. Please send your registration form along with a letter describing why a partial scholarship will be important to your institution. Unfortunately, because of limited funds, we may not be able to assist everyone who applies.

# As leade, educa at the out

INTRODUCING OUR KEYNOTE SPEAKER

### Father Michael Martin, OFM Conv.

Director of Catholic Campus Ministry, Duke University – Durham, NC (former President, Archbishop Curley High School, Baltimore, MD)

# "Anchor or Sail? What is Your Vision of Catholic Education?"

As leaders and believers in the mission of Catholic education, all of us recognize that "relationship is at the heart of mission." Living the Gospel and our relationships with Jesus and all those in our ministries, further connect all of us to our shared mission and important work.

Father Michael Martin, OFM Conv. is a proven leader well known for breathing new life and great success through strong relationships built upon his vision and passionate commitment to the mission of Catholic education. A graduate of Archbishop Curley High School in Baltimore, Father Mike earned a B.A. in Philosophy at St. Hyacinth College-Seminary followed by an S.T.B in Theology in 1988 through the Pontifical Theological Faculty of St. Bonaventure – The Seraphicum in Rome. He then gained a M.Ed. from the Catholic School Leadership Program at Boston College in 1994.

Ordained a priest in 1989, Father Mike further developed his love for Catholic education first as Admissions Director, Religious Studies teacher, moderator and coach at St. Francis High School in Athol Springs, New York from 1989-1994 and then a similar role back at Archbishop Curley prior to being named Principal from 1996-2001 and then President from 2001-2010. Since 2010 Father Mike has built a highly regarded Catholic Campus Ministry program at Duke University where he extends the mission of Catholic education to college students from across America and the world.

A RECIPIENT OF THE PRO ECCLESIA ET PONTIFICE PAPAL HONOR, FATHER MIKE HAS BROUGHT HIS EXCEPTIONAL LEADERSHIP AND RELATIONSHIP SKILLS TO NUMEROUS LOCAL AND NATIONAL SCHOOL AND ASSOCIATION BOARDS.

### Attendees Comment on their Partners in Mission Conference Experience

"... I am better at what I do because of what that Partners in Mission has shared..."

I can honestly say this conference changed my life and has given me and my team a "real conversation" opportunity for the first time in two years. We have a more targeted plan and we cannot thank you enough!

Paul Gessner, Head of School, St. Joan Antida High School, WI

Your team is truly phenomenal! Best conference I've ever attended! Support staff was wonderful and there wasn't a single detail that was overlooked. Great job!

Susan Hehir, Director of Alumnae and Parent Relations, Ursuline Academy, MA

As a first year admissions director, the conference was a priceless experience. The amount of information and tools that were provided will absolutely enhance my school's enrollment efforts. The conference was engaging, well organized and tremendously fun. Cristin Eick, Director of Admissions, Bethlehem Catholic High School, PA



Each member of the Partners in Mission team did an incredible job of personalizing the experience for each of us. I felt incredibly valued personally. That focus on relationship-building is truly the heart of Catholic education, and its hope for the future. Thank you for modeling what it means to see dignity in every person - that truly transcends processes, information, action steps, and strategies and sets Partners in Mission apart.

Melissa Brickey, Vice President of Advancement, Rosati-Kain High School, MO "You will learn quickly why their name is Partners in Mission - they are truly in the trenches with you so they know your battles and they are not afraid to walk alongside you because we can lift ourselves up more effectively together rather alone."

Carol Sue Scurti, Director of Marketing and Enrollment Management, Steubenville Catholic Schools, OH "I was very impressed with the Partners in Mission Team. They are educated, engaging, and truly passionate about what they do. The Partners in Mission Team is a visual example of Catholic Education being a family experience."

Gabby Schauer, Alumni Relations & Advancement Events Coordinator, Totino-Grace High School, MN



### **NEW IN 2021!**

As part of the conference offerings, you will be assigned to a **"COHORT GROUP"** based on your role or level of your experience. After you leave Boston and put into practice what

you have learned, you are encouraged to connect online with your cohort and share ideas, discuss the latest topics in Catholic school advancement or enrollment management, and benefit from colleagues with whom you have much in common.

### MEET THE PARTNERS IN MISSION TEAM AND CONFERENCE FACULTY

CHRIS HAGERTY



I ARRY FLIREY FOUNDER AND PARTNER, PARTNERS IN MISSION ASST. HEADMASTER OF ADVANCEMENT (FORMER) Xaverian Brothers High School (MA) Larry recently completed a \$25 million capital campaign for Xaverian.



SENIOR PARTNER, PARTNERS IN MISSION PRESIDENT Cathedral Preparatory School (PA) Villa Maria Academy (PA) Chris secured a \$23 million gift for Cathedral Prep and Villa Maria Academy.



TOM BRODNICKI SENIOR PARTNER, PARTNERS IN MISSION VICE PRESIDENT OF ADVANCEMENT (FORMER) University of St. Francis (IL) Tom's 45 years in the field turns your capital campaign dreams into reality.



KATHLEEN CASEY ASSOCIATE SUPERINTENDENT OF SCHOOLS (FORMER) Diocese of Bridgeport (CT)

Kathleen translates her strategic and marketing success in both corporate and academic settings to help Catholic school leaders optimize mission and margin.



AL CATELLI DIRECTOR OF ADMISSIONS (FORMER) Pope John Paul II High School (MA)

Al has 20+ years experience providing stability, growth, and long-term viability to Catholic elementary and secondary schools across the United States.



JANE DIGIROLAMO CHIEF ADVANCEMENT OFFICER (FORMER) Our Lady of Good Counsel High School (MD)

Jane completed a \$10 million capital campaign for Good Counsel, the largest in their school history.



**CATHY DONAHUE** 

DIRECTOR OF ENROLLMENT & MARKETING (FORMER) Catholic Schools of the Diocese of Bridgeport (CT)

Cathy is a strategic communications professional and dynamic coach for school leadership aiming to grow revenue.



KEVIN DOUGHERTY VICE PRESIDENT OF ENROLLMENT SERVICES

La Salle College High School (PA) Kevin led the campaign that resulted in the largest enrollment in school history, three years in a row.



LAUREN FREDETTE

DIRECTOR OF ADVANCEMENT Bishop Fenwick High School (MA)

Legacy Gala that raised \$133,000

Trinity Catholic High School (CT) Lauren guided the Advancement Program at Trinity Catholic that raised \$145,000 over budget and organized their first



ZANE GIZZI

MAJOR GIFTS OFFICER Penn State College of Medicine (PA) DIRECTOR OF ADVANCEMENT (FORMER)

Lancaster Catholic High School (PA) Zane built a Planned Giving Program at Lancaster Catholic second to none.



**MARIA IPPOLITO** 

DIRECTOR OF SCHOOL MARKETING AND COMMUNICATIONS (FORMER) Archdiocese of Chicago (IL)

Maria led the efforts around the development of the Archdiocese's very successful Parent Ambassador Program.



SUMMARY OF SERVICES

Partners in Mission is a full-service consulting firm focused exclusively on developing excellence in Catholic school advancement and leadership. Our dedicated team of professionals partner with clients to advance their missions by providing comprehensive and effective solutions to address the challenges they face every day. Specializing in advancement program assessments, volunteer leadership, enrollment management, capital campaign management, annual fund segmentation, major gift solicitation, planned giving, stewardship, strategic planning and leadership training, among other related services, Partners in Mission offers proven strategies and practices to advance the mission of growth and excellence in Catholic schools, dioceses,

religious congregations and parishes.

Our team has served over 800 Catholic

schools and dioceses around the country



KATHY LINK

SENIOR DIRECTOR OF SCHOOLS (FORMER)

Healey Education Foundation (NJ) Kathy helped develop, launch and train Boards of Specified and General

Jurisdiction across the county.



**MARY LUND** DIRECTOR OF ADVANCEMENT

Mercy High School (CA) Mary raises over \$400,000 at her school's Scholarship Luncheon each year.



KEVIN QUINN

VICE PRESIDENT OF ADVANCEMENT (FORMER)

Immaculata University (PA)

Kevin brings over 25 years of Catholic higher education experience to Partners in Mission.



**GREG MARKITON** DIRECTOR OF ADVANCEMENT

Benedictine Military School, Savannah (GA)

Greg has created one of the most successful Catholic school advancement programs in the country.











BOB TIFT, ED.D.

strategic planning.

PRESIDENT (FORMER) Benilde - St. Margaret's School (MN) Bob's expertise includes governance and Board development, and

in more than 40 states. Our consultants are accomplished professionals who bring a wealth of experience to Catholic school advancement; many of us actually began our careers working at our high school alma maters. As partners among ourselves and with our clients' missions, we value, understand and embrace the importance of Catholic education in our personal and professional lives — and remain committed to ensuring its strength and vitality for vears to come.



KATIE THIEMANN

DIRECTOR OF LEADERSHIP GIVING Cor Jesu Academy, St. Louis (MO) Katie led a \$10,000,000 capital campaign while simultaneously growing the school's Endowment from \$1,900,000 to

\$8,400,000.



WWW.PARTNERSINMISSION.COM