



Advancement and Leadership
Services for Catholic Education

THE NATIONAL LEADERSHIP CONFERENCE FOR CATHOLIC SCHOOLS™

The Ultimate Strategic Relationship:
Board Members | Presidents/Principals | Directors of Advancement | Directors of Admission

SUNDAY, MARCH 6 TO TUESDAY, MARCH 8, 2022
HALF-DAY WORKSHOPS ON WEDNESDAY, MARCH 9, 2022
HILTON NAPLES HOTEL, NAPLES, FLORIDA

#PIMNaples

Strategic Partners:

boostmyschool

ALUMNIFIRE

H&A HABEED & ASSOCIATES
ARCHITECTS

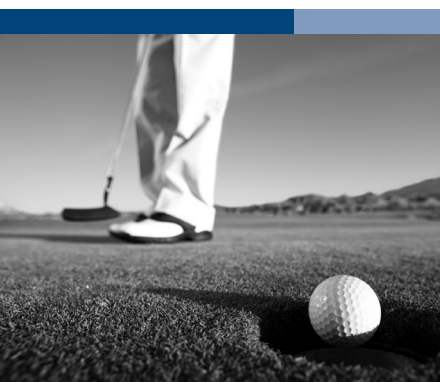


THE NATIONAL LEADERSHIP CONFERENCE FOR CATHOLIC SCHOOLS



HILTON NAPLES HOTEL

Enjoy the perfect setting for this highly concentrated conference — a relaxing environment conducive to discussion and reflection — the perfect complement to a full, dynamic conference program. Attendees can expect to come away renewed, focused, and inspired to begin a new chapter in their career and in their relationships.



Spend time with your prospects and donors who live or winter in Florida. Plan your reception today to leverage the time, place, and energy of the National Leadership Conference to advance your School's mission.

Explore and enhance the Strategic Relationship among Presidents/Principals, Directors of Advancement, Directors of Admission, and Board Members.

Hilton Naples Hotel, Naples, Florida — Sunday, March 6 to Wednesday, March 9, 2022



PROGRAM OVERVIEW

Every successful investor knows that lasting success for any organization or institution ultimately depends upon vibrant and dynamic leadership. Both research and experience show that successful Catholic school leadership invariably begins with an exceptional, high-quality relationship between the President/Principal and the Director of Advancement and/or Director of Admission — “the ultimate strategic relationship,” working together to advance the school's mission of excellence in transforming young lives in and through Christ. This conference will help you develop “the ultimate strategic relationship” for advancing your mission and raising the resources you need.

PROGRAM BENEFITS

- Greater clarity in understanding your personal strengths and specific, detailed practices to enhance your effectiveness in leading others while inspiring and developing their abilities
- Confronting issues of school culture and challenges facing Catholic school advancement with peers who share those same challenges
- Grasping valuable “lessons learned” from veteran Presidents, Principals, Directors of Advancement, Directors of Admission and Board Members on building trust and developing strong working relations with each other and with their school constituencies
- Timely information and effective methods to enhance Board relations, school finance, advancement, and staff supervision
- Draft new action plans or enhance existing plans for 12 months of highly effective, professional leadership development
- Compare notes and develop lasting connections with other Presidents, Principals, Directors of Advancement, Directors of Admission, and Board members who share similar leadership and advancement challenges

CONFERENCE GOALS

- Increased clarity and awareness of your personal strengths and unique abilities as a Catholic school leader
- Reassess, renew and recommit to your personal leadership strengths to the service of Jesus in the Catholic church and in your school
- Identify key strategic relationships in both the outside and inside school communities, prioritize them, and explore and discover proven methods to significantly improve the effectiveness and productivity of those key relationships
- Learn the most effective, community-building best practices to use both inside and outside your school that will turn it into an attractive, and indeed, a compelling investment in excellence in Catholic education — carrying out the work of transforming young lives in and through Christ

#PIMNaples

**Partners
in Mission**

Advancement and Leadership
Services for Catholic Education

CONFERENCE SCHEDULE

SUNDAY, MARCH 6

4:00 to 6:00 p.m.

Conference Registration, Hotel Lobby

6:00 p.m.

Opening Conference Mass

7:00 p.m.

Opening Conference Reception, Spa Terrace

MONDAY, MARCH 7

7:45 a.m.

Conference Registration

7:45 a.m.

Conference Mass

8:30 a.m.

Welcome and Introductions from Partners in Mission

Opening Prayer

Overview of the Conference and Introduction of Keynote Speaker

9:15 a.m.

Opening General Session

Keynote Presentation: "Living a Felt Life" by General Martin E. Dempsey, Retired Chairman of the Joint Chiefs of Staff

10:30 a.m.

Break with Strategic Partners and Sponsors

10:45 a.m.

Work SMART-er not harder in 2022

11:45 a.m.

Lunch Roundtables

*Presidents/Heads of School
Directors of Advancement
Directors of Admissions
Elementary Schools
Principals
Board Members*

1:00 p.m.

Presidents/Principals/Directors of Admissions and Advancement Panel

2:15 p.m.

The Fundraising Power Couple: The Relationship Between the President/Principal and the Director of Advancement

3:00 p.m.

Break with Strategic Partners and Sponsors

3:15 p.m.

Building a Successful Fundraising Board Model from the Perspective of the

President and Director of Advancement

4:00 p.m.

Conference Announcements

5:15 p.m.

Winding Down...Winding Up Cocktail Reception

TUESDAY, MARCH 8

7:45 a.m.

Conference Mass

8:30 a.m.

Opening Prayer

Conference Announcements

8:40 a.m.

Mission, Vision and Strategic Planning: The Foundation Upon Which a Successful Advancement Program is Built

9:45 a.m.

Break with Strategic Partners and Sponsors

10:00 a.m.

Panel of Catholic Philanthropists/Leaders

10:00 a.m.

Working the Plan – Getting It Done! The Head of School and Director of Advancement/Director of Admissions Partnership

12:15 p.m.

Conference Photograph, Poolside

11:45 a.m.

Lunch Roundtables

*Presidents/Heads of School
Directors of Advancement
Directors of Admissions
Elementary Schools
Principals
Board Members*

1:30 p.m.

Letting Go: Eliminating from Your Day What Doesn't Matter and Deciding not what to do)

2:15 p.m.

Stewardship in Relationships

2:45 p.m.

Break with Strategic Partners and Sponsors

3:00 p.m.

Inspiration: The Tipping Point of Leadership and Philanthropy

3:30 p.m.

The National Leadership Conference for Catholic Schools Concludes



CONFERENCE NETWORKING

- Outdoor Welcome Reception on Sunday evening
- Winding Down/Winding Up Cocktail Reception on Monday evening

WHY SHOULD YOU ATTEND

- 100% focus on Catholic schools and Catholic school leadership
- A resource manual filled with useful information and sample documents for each participant
- Dynamic presentations by the Partners in Mission Team
- Complimentary onsite and follow-up consultation
- Opportunity to visit your alumni, grandparents, and friends who live or winter in Florida

WHO SHOULD ATTEND

- Heads of Schools
- Presidents and Principals
- Directors of Advancement
- Directors of Admission
- Board Members
- Superintendents
- Religious Community Leaders

#PIMNaples

HALF-DAY WORKSHOPS

Following The National
Leadership Conference
Wednesday, March 9, 2022
8:30 a.m. to 12:00 p.m.

THE WEDNESDAY HALF-DAY WORKSHOP IS INCLUDED IN THE CONFERENCE REGISTRATION FEE

Sessions run concurrently, choose one.

WORKSHOP 1

Capital Campaigns in Challenging Times and Cultivating, Soliciting, and Making the Ask

Strategic Planning, What You Need to Know to be Successful, Readyng the School, Campaign Budgeting, Staffing and Structure, The Role of Staff and Volunteers, Soliciting Major Gifts, and Electronic Wealth Screening. In addition, this workshop will focus on Role Playing, the Face-to-Face Ask, and Strategizing Individual Situations for Cultivation and Solicitation.

WORKSHOP 2

One-Day Giving Programs

Catholic secondary and elementary schools across the country have caught on to the giving day craze like never before... and for good reason. These powerful fundraising marathons – usually 24 hours long – have become a fun way to rally alumni and donors for quick, yet impressive, results. Join us and find out how you can grow your annual fund in one day!

WORKSHOP 3

Annual Fund

Building a \$1,000 Leadership Giving Program, Segmentation Strategies, Making Leadership Gift Calls, Effectively Utilizing Volunteers in the Annual Fund and Phonathons.

WORKSHOP 4

Planned Giving Programs

Using Planned Gifts to Build Endowment, How to Build a Bequest Program, Identifying Your Best Planned Giving Prospects.

WORKSHOP 5

Enrollment Management

Branding and Marketing, Strategies to Maximize Enrollment, Recruitment, and Retention, and Best Practices for Tuition Management.

WORKSHOP 6

Communications/Social Networking/Websites

Brand Management, The Integrated Website Solution, Facebook, Social Media: Going Online to Connect Your Alumni and More.

SUMMARY OF SERVICES

Partners in Mission is a full-service development consulting firm specializing in Catholic school advancement. We partner with our clients in advancing the mission of their organizations. We provide comprehensive solutions to the varying challenges they face. Specializing in capital campaign management, annual fund segmentation, major gift solicitation, strategic planning, volunteer leadership, and enrollment management, among other advancement-related services, Partners in Mission offers proven development strategies focused on mission and relationships. As a team, we value, understand, and embrace the mission of Catholic education in our personal and professional lives and remain committed to ensuring its vitality and legacy for many years to come.

REGISTER ONLINE

www.partnersinmission.com/naples22

CONFERENCE REGISTRATION

The cost of the all-inclusive conference is \$999 for each participant. The fee includes an extensive conference manual, post-seminar telephone consultation, lunch on both days, refreshments, and receptions on Sunday and Monday evenings. Accommodations not included. Register early as space is limited.

CANCELLATION POLICY

A full refund (less a \$100 administrative fee) if you cancel in writing by January 31, 2022. No refund will be made if your cancellation is received after January 31, 2022. Partners in Mission reserves the right to cancel any program or activity due to low registration.



ACCOMMODATIONS

Hilton Naples is ready to exceed your expectations with a special rate of \$234 for Partners in Mission conference attendees. Visit www.partnersinmission.com/naples22 or call 1-800-HILTONS to reserve your room. The code to book is PIM.

Our centralized meeting rooms were designed to help you maximize time spent networking, mingling, and energizing during your meeting.

And after the work is done, take time to enjoy award-winning dining at Shula's Steak House, walk to world-class outdoor shopping at the Waterside Shops, and relax on gorgeous beaches a short shuttle or bike ride away.

REGISTRATION FORM

- ☐ Please reserve ____ place (s) for Partners in Mission Conference from March 6 to March 8, 2022, in Naples, FL.
- ☐ Please reserve ____ place (s) for Partners in Mission Half-Day Workshop on March 9, 2022. Sessions run simultaneously, choose one.
- ____ Workshop 1 ____ Workshop 2 ____ Workshop 3
____ Workshop 4 ____ Workshop 5 ____ Workshop 6
- ☐ Check enclosed: \$ _____ ☐ Our check will follow: \$ _____
- ☐ Please send me additional information on other Partners in Mission services

Name _____ Title _____

Name _____ Title _____

Organization _____

Address _____

City _____ State _____ Zip _____

Phone _____ E-mail _____

Please make checks payable, and mail registration to:

Partners in Mission, LLC, 8 Nicklaus Way, Mashpee, MA 02649



If you have questions, contact Larry Furey at lfurey@partnersinmission.com or (781) 710-0242 or Chris Hagerty at chagerty@partnersinmission.com or (814) 566-7500. You will receive confirmation upon receipt of your registration form and payment. Final conference information will be sent to you in February and will include full details on the conference's daily schedule and activities.

FOR MORE INFORMATION: WWW.PARTNERSINMISSION.COM/NAPLES22

INTRODUCING OUR KEYNOTE SPEAKER

General Martin E. Dempsey

United States Army, Retired - Chairman of the Joint Chiefs of Staff



Freedom accumulating 42 months in combat.

General Dempsey, a proud alumnus of John S. Burke Catholic High School in Goshen, New York is a 1974 graduate of West Point and has master's degrees from Duke in Literature, from the Army Command & General Staff College in Military Science, and from the National War College in National Security Strategy. He also has an Honorary Doctorate Degree in Law from University of Notre Dame.

His military awards include the Bronze Star with Valor device, the Defense Distinguished Service Medal, and Distinguished Service Medals from the Army, Navy, Air Force, and Coast Guard as well as awards from other departments in the United States Government including the Office of the Director of National Intelligence, the Central Intelligence Agency, and the National Security Agency. He has received awards from many of our allies including France, Germany, Italy, Poland, Croatia, Israel, Japan, the Republic of Korea, and Singapore.

General Martin E. Dempsey retired after 41 years of military service. During his time in the Army, he commanded a Cavalry Troop, a Tank Battalion, a Cavalry Regiment, a Tank Division, and United States Central Command where he was responsible for securing U.S. interests in the Middle East and South Asia. He served in both Operation Desert Storm and Operation Iraqi

In the last five years of service, he served as the Chief of Staff of the United States Army and then as the Chairman of the Joint Chiefs of Staff. As Chairman of the Joint Chiefs of Staff, he was the senior officer in the Armed Forces and the military advisor to the Secretary of Defense and to the President.

In 2015, General Dempsey was named one of the 100 most influential leaders in the world by *Time Magazine*. In 2016, he was knighted by Queen Elizabeth II. He has been inducted into the Irish-American Hall of Fame as well as the New Jersey Hall of Fame.

General Dempsey and his wife, Deanie, have been married for 45 years. They served the military as a team, and Deanie was instrumental in supporting military families and championing many of the family programs that have been critical to our success over the many years of conflict.

Marty and Deanie have three children and nine grandchildren. Each of their three children served in the Army, and their son, Chris, continues to serve as a Lieutenant Colonel.

General Dempsey's post-military career includes a teaching position at Duke University in public policy and leadership, a role as the Special Advisor to the Commissioner of the National Basketball Association for leader development and youth programs, and as Chairman of USA Basketball. General Dempsey is also a Director on the Boards of TAPS and The Bob Woodruff Foundation.

#PIMNaples

**Partners
in Mission**
Advancement and Leadership
Services for Catholic Education

OPENING CONFERENCE MASS CELEBRANT

Rev. John Belmonte, S.J., Ph.D.

Superintendent of Catholic Education
DIOCESE OF VENICE, FL



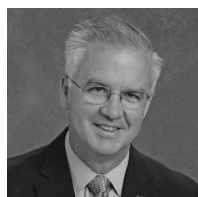
SAVE THE DATES FOR OUR 2022
CONFERENCES IN BOSTON!

THE NATIONAL ADVANCEMENT
SUMMER INSTITUTE FOR
CATHOLIC SCHOOLS
Boston, Massachusetts

**JUNE
19-23
2022**

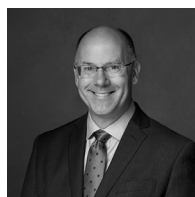
**SAVE
THE
DATE**

MEET THE PARTNERS IN MISSION TEAM AND CONFERENCE FACULTY



LARRY FUREY

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.



CHRIS HAGERTY

SENIOR PARTNER,
PARTNERS IN MISSION
PRESIDENT (FORMER)
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.



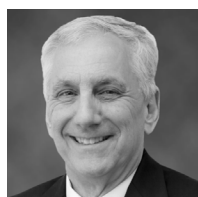
MARIA IPPOLITO

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.



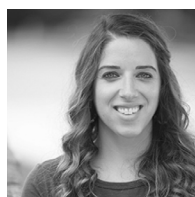
JAKE PUCCI

DIRECTOR OF ADMISSIONS AND
ENROLLMENT MANAGEMENT
La Salle High School (OH)
During the past 14 years, Jake utilized
historical statistics and grade school
enrollment numbers to make data-driven
decisions.



AL CATELLI

DIRECTOR OF ENROLLMENT
MANAGEMENT (FORMER)
St. 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.



CAITLIN HALLE

DIRECTOR OF MARKETING AND
COMMUNICATIONS
Partners in Mission
Caitlin oversees the web presence,
digital and direct marketing, event
strategy, and brand management for
Partners in Mission.



KEVIN QUINN

VICE PRESIDENT OF ADVANCEMENT
(FORMER)
Immaculata University (PA)
Kevin brings over 25 years of Catholic
higher education experience to Partners
in Mission.



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.



SIOBHAN LIDINGTON

DIRECTOR OF ANNUAL AND
INDIVIDUAL GIVING
Albertus Magnus College (CT)
Siobhan leads the annual and major
giving programs and has achieved
20% growth in dollars raised the last
two years.



JOHN REY

PRESIDENT
Mater Dei Catholic High School (CA)
John Rey brings strong leadership skills
and a financial background. A problem
solver by nature, John takes a hybrid
approach to leadership which combines
strategy, creativity, empowerment,
and focus.



CATHY DONAHUE

DIRECTOR OF ENROLLMENT &
MARKETING (FORMER)
Catholic Schools of the Diocese of
Bridgeport (CT)
Cathy has over 30 years of experience
helping school leaders build thriving
school models.



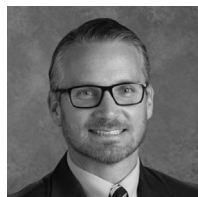
KATHY LINK

SENIOR DIRECTOR OF SCHOOLS
(FORMER)
Healey Education Foundation (NJ)
Kathy has helped many of our Catholic
elementary and high school clients
experience an average enrollment
increase of 11%.



CHRIS STILES

DIRECTOR OF ADVANCEMENT
Mount St. Mary High School (OK)
Chris has just completed a \$6 million
capital campaign.



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.



MIKE LOYET

PRESIDENT (FORMER)
St. John Vianney High School (MO)
Mike has served in Catholic education for
39 years as a classroom teacher, coach,
administrator and school president.



KATIE THIEMANN

DIRECTOR OF LEADERSHIP GIVING
Cor Jesu Academy (MO)
Katie led a \$10,000,000 capital campaign
while simultaneously growing the
school's Endowment from \$1,900,000 to
\$8,400,000.



LAUREN FREDETTE

DIRECTOR OF ADVANCEMENT
Sacred Heart Greenwich (CT)
Lauren secured four \$1,000,000 gifts
in one year for her school's major gifts
program.



MARY LUND

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



BOB TIFT, ED.D.

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



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.



GREG MARKITON

DIRECTOR OF ADVANCEMENT
Benedictine Military School (GA)
Greg has created one of the most
successful Catholic school advancement
programs in the country.



ROB WEBB

PRESIDENT
Chaminade College Preparatory (CA)
As President, Rob has more than doubled
Chaminade's endowment and added
real estate to the school's portfolio of
investment holdings.