



OUR LADY OF SORROWS

Faith + Knowledge + Community

Advancement Strategic Plan

2017 –2018



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Our Lady of Sorrows Advancement Strategic Plan

MISSION

The mission of advancement at Our Lady of Sorrows Catholic School is: to build awareness, acceptance, and support for the school and its mission; to provide the number of qualified students that the school desires and can serve; and to obtain financial support for annual operational expenses, special projects, and capital growth. We work together to build the Kingdom of God....one child at a time!

The underlying goal of advancement at Our Lady of Sorrows Catholic School is to facilitate a comprehensive financial resource plan to assist the school through Annual Fund, Capital Campaign, and Endowment (through planned giving).

Advancement Council

Definition of the Advancement Council

The mission of the Our Lady of Sorrows Catholic School Advancement Council is to create, plan, implement, and sustain an advancement process that will support the ministry of OLS.

The Advancement Council is a core team of 8-12 dedicated and committed people who work with the Pastor, Principal, and Advancement Director on the advancement duties outlined in the Our Lady of Sorrows Catholic School Strategic Plan. Basic responsibilities include:

- Understanding the scope of advancement and working to Identify, Inform, Invite, Involve, Implement, Invest, Improve to grow our school and the support of our community
- Affirming the mission of the school
- Working with the Director of Advancement to increase awareness of Our Lady of Sorrows Catholic School as a leader in quality Catholic education through a comprehensive marketing plan
- Working with the Director of Advancement to increase enrollment and retention at Our Lady of Sorrows Catholic School through word of mouth, marketing, and Open House activities
- Attracting financial support for Our Lady of Sorrows Catholic School from alumni, parents, parishioners, and the local community through fundraising events and strategies

Roles and Responsibilities of Council Members

PLANNING

- To serve as the “steering wheel” to the planning process – evaluate, discern, direct, and focus the information that is introduced – as it applies to the advancing school
- To identify people who will be asked to get involved in the advancement effort to ensure all constituents (school, parish, and alumni) have a presence.
- To help invite people to become involved and educated about the process through direct contact and committee involvement for events, etc.

COMMUNICATION

- To serve as spokespersons for the advancement efforts
- To lead communication efforts and support marketing in regards to the work of the Advancement Council and our strategic plan.
- To honor the confidentiality of information that is discussed by the Advancement Council

LEADERSHIP

- To serve in leadership positions (i.e. leading committees, campaigns, or events)
- To remain positive and mission-driven

Advancement Council Administration

Rev. Mark S. Brauer, Pastor
Mr. James Nordbeck, Business Administrator
Mrs. Meghan Evoy, Principal
Mrs. Julie McCormick, Director of Advancement

2017 – 2018 Advancement Council Members

Mr. Gerry Mato
Mr. Reggie Kakos
Mrs. Jennifer Logan
Mrs. Karey Cunningham
Mrs. Angela Stempien
Mrs. Amanda Cavanaugh
Mrs. Dorothy Foley

*The advancement Council will not meet until after the Strategic Planning Group meets to create the best plan for managing the ongoing business of fundraising and spending goals.

Advancement Council Honorary Members

Active PTG President
Active Athletic Director

Advancement Creative Team

Mrs. Erin Krueger, Graphics
Mr. Brian Sosnowski, Photography
Mrs. Carla Amori, Website and IT
Mr. Mike Chamberland, Videography
Mrs. Michelle Randall, Annual Report

The Saints for Tomorrow Fund

The Saints for Tomorrow Fund is the annual fund drive that enables Our Lady of Sorrows Catholic School to continue the legacy of providing excellence in catholic education in the Farmington area. The Saints for Tomorrow Fund is our giving program that makes a difference in enriching the daily lives of our students by bridging the 15% financial gap not covered by tuition and supporting special needs.

The Saints for Tomorrow Fund drive is an opportunity for current parents, alumni, parents of alumni, faculty and staff, parishioners and community supporters who value Catholic education to make a donation that will make a real impact on Our Lady of Sorrows Catholic School both now and in the future. Donations to The Saints for Tomorrow Fund will be used to keep tuition affordable, to encourage excellence in education through improved recruitment and retention, and to provide needed improvements in technology, building and grounds, and student materials. Contributions will preserve, strengthen, and build on the tradition of faith-filled education at Our Lady of Sorrows Catholic School.

Gifts to The Saints for Tomorrow Fund, no matter how large or small, help us to sustain improvements, programs and activities that are not covered by tuition. The annual financial goal of the overall appeal, to include fundraisers, direct mail campaign, church envelopes, bill wars, etc... will be established annually by the Business Manager of the parish in conjunction with the Advancement Council.

The Saints for Tomorrow Fund: Gift Societies

Gifts of the following amounts will be recognized in the Our Lady of Sorrows Catholic School SFT Annual Report. Gift Levels:

- | | |
|---------------------------|-----------------|
| • Mother of God Circle | \$10,000+ |
| • Monsignor Beahan Circle | \$5,000 – 9,999 |
| • Pastor's Circle | \$1,000 – 4,999 |
| • Saints Circle | \$500 – 999 |
| • Angels Circle | \$250 – 499 |
| • Patrons Circle | \$100 – 249 |
| • Friends of OLS | Up to \$99 |

The Saints for Tomorrow Fund Donor Recognition

A written “thank you” tax document will be issued for each donor within three working days. Donations received between June 23rd and August 7th will be recognized in writing the second full week of August. The giving cycle will be July 1st through June 30th. Donors to The Saints for Tomorrow Fund will be invited to a “Thank You” Mass and Reception each October the first Mass the Music Ministry resumes. The Saints for Tomorrow Annual Report will recognize all donations to our annual effort. The annual report will be published and mailed out to the entire database prior to the first week of school to kick off the new fundraising cycle.

Special Events

Special events must meet four criteria – build community, raise money, celebrate mission and cultivate prospects. They must be “friend-raisers” that appeal to the entire parish base.

All-School Walk for Education

In order to engage our students in the process of advancing the mission of the school, we will host an all school Walk-A-Thon on October 19 ALL DAY. We will ask students to secure an individual sponsorship from family, friends, neighbors, and friends of a minimum of \$50. This event should be fun and include students in the marketing process. This is great marketing for the school as an important presence in the community and will help raise funds to reach our spending goal. Students will receive a \$5 Free Dress Challenge Day on all four of the Fridays directly leading up to the event. These challenge days help us reach and exceed our goal and are especially helpful for families who do not want to participate in reaching out to others for donations. Top earning class wins a prize, top ten earning students win a prize, and all students bringing in donations receive a raffle ticket for each \$10 earned to be placed in our four Friday raffle drawing drum. Goal \$20,000

TRIVIA-KARAOKE NIGHT

Our annual Trivia-Karaoke Night will be hosted on November 19th in the school cafeteria. This “mini” fundraiser will be marketed to current and past school families and parishioners. Twenty-six teams will compete in pub-style trivia and enjoy the opportunity to make new friends and visit with old friends. Raffles and 50/50 will be offered to support this effort. Goal \$10,000

2018 OLS Spring Auction and Gala

As the biggest fundraiser of the year, the OLS Spring Auction and Gala is back by popular demand. The event will be held on April 21st 2018 at the Farmington Hills Manor and will be marketed as a parish-wide event. We will utilize an online bidding platform ClickBid to secure sponsors, sell tickets, and host the live and silent auction. The school families will receive an early bird discount for tickets sold from December 15 – January 15 of 25% and then a standard rate of \$100 per person will apply. Proceeds from the event will support the replacement of the lockers in the Junior High (as well as adding a wall of lockers down the 6th grade wing), updating the hallways with Happy Saints, and supporting PTG enrichment. Goal \$75,000

SHARE THE VISION

Share the vision events are designed to communicate and support the mission of our school and our advancement program. The goal of these events is to build relationships to create a partnership with our surrounding community. Events will include inviting speakers to school to education constituents on the Advancement process, Planned Giving Seminars, Grandparents Day, Veteran's Day Assembly, OLS Parish-Wide Celebration and Homecoming Weekend, Family Movie Night at the Civic Theater, Open House, V.I.P. Day, Partners in Service Breakfast, Donor Mass and Reception, etc....

COMMUNITY PARTNERSHIP FUNDRAISERS

When possible, OLS will partner with surrounding businesses to hold special fundraisers that would create revenue for the annual fund, at no expense to the school aside from marketing. In 2017 OLS will host a shop/dine event with; Peterlin's (Sept. 21), La Marsa (Oct. 17&18), Mother Mary's Toffee (Dec. 11-17), Livonia Italian Bakery (Feb. 8&9), Applebee's/Barnes and Noble (March 7) , Saxton's Floral (May 18, 19, 20), Panera Bread (May 30),

FIVE DOLLAR Free Dress Challenge Days

We will offer a \$5 Free Dress Challenge Days before the Walkathon and Auction as opportunities to generate more funds and offset costs for the event. All students are invited to come to school in free dress (according to the Parent/Student Handbook) and donations will be collected discreetly and on a voluntary basis.

Drive One 4 UR School October 15

Our goal through this mini-fundraiser is to earn \$6,000 for the annual fund. One driver over age 18 per household will be given the opportunity to test drive a vehicle from Tom Holzer Ford and earn \$20 for the school, up to \$6,000.

RECTORY "CHEW AND CHATS"

To the extent that the Pastor is available, small group dinners will be arranged at the Rectory to further build on donor relationships. These "good will" meetings will be used to thank donors, establish relationships, share the vision of the school, and secure financial support.

OLS DAY AT THE FARMINGTON FARMER'S MARKET

In order to build on our relationship with the city and broaden awareness of our program, OLS will sponsor the "Little Sprouts" booth at the Farmington Farmer's Market in the spring of 2018. This is a great opportunity to market our school and establish relationships while meeting with potential parents and students.

Share the Vision

We will work to be a visible presence at all school group activities in order to promote the mission of advancement at OLS, to include, Meet the Teacher, Curriculum Night, School and Parish Club and Group meetings, and possible directed events that will be placed on the calendar solely for the purpose of

education and fellowship. **Clubs like Grand Saints and Little Saints will meet throughout the year to bring the youngest and oldest of our community together for fellowship and to grow in mission.**

SPIRIT WEAR

Educational Outfitters is the sole provider of spirit wear for OLS. Items purchased through Educational Outfitters will provide a % back to the school on all sales. In addition, Educational Outfitters will support OLS with raffle items for all fundraising events.

Ways to Give

“Fund-raising is first and foremost, a form of ministry. It is a way of proclaiming what we believe in such a way that we offer other people an opportunity to participate with us in our vision and mission.” Henry Nouwen

Our Lady of Sorrows Catholic Parish and School have been blessed throughout our 80 plus year history to be the recipient of many gifts of service, prayer, encouragement and financial support. We appreciate the many sacrifices that have enabled Our Lady of Sorrows Catholic School to continue to offer the benefit of an excellent Catholic education in the Farmington area. The following giving opportunities are available for those who desire to help Our Lady of Sorrows Catholic School financially.

GIVING OPPORTUNITIES:

The Saints for Tomorrow Fund

Gifts made to The Saints for Tomorrow Fund help us sustain programs and activities that are not covered by tuition. The Saints for Tomorrow Fund ensures the advancement of the mission of Our Lady of Sorrows Catholic School by keeping tuition affordable, offering competitive teacher salaries, integrating best practices instruction, maintaining the school infrastructure, and supporting an advancement program. Gifts may be made by cash, check, or pledge. A receipt will be mailed to you for your tax-deductible contribution within three days of receipt of gift. Major gift donors will be thanked seven times during the calendar year in conjunction with parish and school leadership.

The Monsignor Thomas P. Beahan Education Endowment Fund

Part of a comprehensive financial plan for Our Lady of Sorrows includes a planned giving program. Our new endowment fund, The Monsignor Beahan Education Endowment Fund, will be grown through planned giving. The fund will be marketed through Estate Planning Seminars, the OLS funeral planning packages, direct marketing through one on one contact, and through the church bulletin. The fund will be established with an initial \$1,000 minimum from The Saints for Tomorrow Fund. Estate Planning Seminars will be held once in the fall and once in the spring. Parishioners with expertise in the area of estate planning and planned giving will be invited to sponsor the events. Speakers at planned giving seminars must be informative and not self-serving.

Special Events Sponsorships

Securing fundraiser sponsorships is crucial in order to cover event costs and increase revenue for the school. An Our Lady of Sorrows Catholic School event sponsorship is a win-win situation for the sponsor and the school. The school receives a generous donation to help reduce expenses, and in return, the sponsor receives numerous promotional benefits.

Memorial and Honor Gifts

Family and friends can choose The Saints for Tomorrow Fund or The Monsignor Beahan Education Endowment Fund when making gifts to honor anniversaries, birthday, wedding and other milestones or in memory of a loved one. All gifts will be acknowledged with a card. Simply let us know whether your gift is in memory or honor of someone and provide the name and address of the person or family who should receive the acknowledgment card. A receipt will be mailed to you for your tax-deductible contribution.

In Lieu of Flowers

Families will be given the choice through our funeral planning packages to offer a donation to Our Lady of Sorrows Catholic School through The Saints for Tomorrow Fund and The Monsignor Beahan Education Endowment Fund "in lieu of flowers". The Advancement Director will meet regularly with the surrounding funeral homes to make sure they have all the materials and brochures needed to support this effort.

Types of Gifts

The following types of gifts benefit Our Lady of Sorrows Catholic School and may be given in any of the areas listed above:

Cash

Cash gifts are the easiest way to support our annual effort to create a comprehensive fundraising plan.

Matching Gifts

Many companies match employee gifts. This is a great way to double your donation. Contact your company's human resource department to request your company's Matching Gift Form and mail that in along with your donation.

Pledge

You might find that you can increase your contribution to The Saints for Tomorrow Fund by making a pledge with payments spread over several months or years.

Planned Giving

This can bring immediate and deferred tax advantages to both you and your heirs while having a meaningful impact on Our Lady of Sorrows Catholic School, beyond your own lifetime and far into the future. A planned gift may be initiated during your lifetime or as part of your estate through your will or a

trust. The Monsignor Beahan Education Endowment Fund is held and managed by the Archdiocese of Detroit Endowment Foundation. Gifts to our endowment fund are never spent but are invested to produce distributions to the school forever. OLS will accept gifts in the form of will/bequest, retirement plan assets, life insurance, charitable gift annuity, and cash.

Securities

A gift of securities may provide you with tax advantages. For more information contact **Mr. James Nordbeck at 248-615-5575 or email at jnordbeck@olsorrows.com**.

Helping Hands

Our Lady of Sorrows Catholic Parish and School salutes with deep gratitude our many loyal supporters and benefactors who have supported our community for over 80 years. We are blessed by the generosity of Our Lady of Sorrows Catholic parishioners and school families in their support over the years. The Saints for Tomorrow Fund and the success of our school advancement program will need many "helping hands" support us with your gift of time, talent, and treasure. Many volunteers are needed to assist with our fundraising efforts and events. Our Lady of Sorrows Catholic School Alumni must also faithfully contribute to the charitable activities that will support and ensure our existence for the next century. To become involved in The Saints for Tomorrow Fund and the activities of the Our Lady of Sorrows Catholic School Advancement Department please contact Julie McCormick at (248) 536-1174 or through email at jmccormick@olsorrows.com.

Gifts may be mailed to:

**Our Lady of Sorrows Catholic School
Attn: The Saints for Tomorrow Fund
24040 Raphael Road
Farmington, MI 48336**

Donate immediately online at:

**www.olsorrows.com/content/giving and select
The Saints for Tomorrow Fund.**

Enrollment Management

General Governing Policy

When processing applicants for the following school year we recruit more than we can accept, accept more than we enroll, and enroll more than we retain. In all cases we will seek to maintain a strong Catholic culture in our school. Our Lady of Sorrows School is a Parish School. Our policy is to admit students according to the following priorities:

- Students who are currently enrolled in Our Lady of Sorrows Catholic School.
- Students of families who are current, participating members of Our Lady of Sorrows Parish.
- Non-parish Catholic students who currently have a sibling enrolled in Our Lady of Sorrows School.
- Non-parish Catholic students who qualify.
- Non-Catholics who qualify and agree to the school's religious instructions policy.

If presently registered families do not re-register and pay the non-refundable registration fee on or before

our school Open House, those students will not be assigned priority level and may be placed on a waiting list in the order applications are submitted.

Student enrollment will be judged on an individual basis. At the discretion of the Principal, an admissions test in math and reading may be administered to each new student entering grades 1 through 8 prior to acceptance. As warranted, other records may be sought prior to acceptance. Factors to be considered include, but are not limited to, parish participation, past scholastic and citizenship records. In order to maintain a strong Catholic identity, our non-Catholic student population will be limited to 10%. If we reach this threshold, non-Catholic students will be placed on a waiting list.

General Marketing

A variety of marketing strategies will be used to cover a broad base of communities to include: magazines, newspapers, events, radio, word of mouth, brand messaging, geo-fencing, banner ads and social media boosted posts. The school will utilize a full page in the weekly OLS church bulletin to market to non-enrolled parish members by highlighting the great activities our school is doing. We will seek to insert our flyers in the parish bulletin of the non-school based catholic churches in the 28 communities that we source from. In addition, we will post to our Facebook pages daily with highlights of activities and utilize the “boost” option when looking to recruit for open house. Eblast from both school and parish will be used. Videos will be used as often as possible to promote events, celebrate student life, and create interest in school programs and enrichment activities. Open House advertising for 2017-2018 will include:

- Sunday Select (1/21/18, zone 5), ¼ page full color: \$615
- O&E – Full Run (1/25/18), ¼ page, main section, full color: \$575,
- High Impact Digital on Hometownlife.com (1/26 & 1/27/18): \$875

Target Marketing

Our message will be geared towards a qualified Catholic audience through Catholic newspapers, parish bulletins, school newsletters and feeders, and qualified direct mail. Part of our target marketing campaign within the parish (to bring more parish families into the school) includes:

- Married Couple – newly married couples will receive a congratulatory card from our school which will also include general information on how to support our ministry and learn more about us.
- Baptized Children – newly baptized children will receive a congratulatory card from our school with general information and a message “hope to see you here someday”.

Tours and Shadowing

The Advancement Director will offer private tours of the school as requested and will offer as follow up a one-on-one meeting with the Assistant Principal or Principal for specific curriculum questions. Student will be invited to our “Shadow a Saint” days. Follow up letters will be sent on all tours by our Registrar and individual meetings with the student and parent will be arranged with the Registrar/Advancement Director at the conclusion of all shadow visits. Teachers will be notified in writing at least 24 hours prior to a shadow visit.

Open House

Good first impressions make a difference. Our school “brand” must speak loud and clear through our open house. Teachers should be present in classrooms with examples of work and hands-on activities. Our special groups and clubs should be present to underscore how children in faith, knowledge, and community. Individual tours should be conducted by knowledgeable guides and brand messaging items should be given at the end as a gift. All guests to the open house will fill out a survey in order to follow up with them personally by mail first and then with a phone call initiating a personal invitation to shadow. Clubs and other parish ministries will be present to provide for answers to questions and entertainment. The PTG will provide refreshments and we will have an Apply Now table available and a Spirit Wear table available. All materials (flyer, ads, and brochure) will be updated to give a fresh look to our theme of “Our Lady of Sorrows is a great place to grow up.” The cafeteria walls will be decorated with the CSW theme phrase words and pictures of our students participating in school life.

Social Media and Website

We will work to rebuild our Website through Edlio with a projected launch date of October 1. This will include the creation of a new parish and school video that will be prominent on the website and also used for recruitment, retention, and fundraising purposes. We will also use Facebook and Twitter in an effort to market the school, our mission, and our special events. In 2017 we will look to use the “boost” feature on Facebook in order to create more “Likes” to our page. Video of special events will be used to promote the school and our mission. These videos will be linked to our Facebook and Website, as well as through email blasts to the school and parish. We will also resume primary responsibility for the parish Facebook page. A school video around our theme of “Our Lady of Sorrows is a great place to grow up” will be created and boosted through Facebook as well as on digital ads and the website.

Brand Management

Brand Management is the DNA of our school and our messaging must be clear and consistent. The Advancement creative team worked to create one standardized logo to be used for all school and parish messaging. Permission from the advancement office must be granted prior to any group using the logo and the OLS graphic style guide must be adhered to.

OLS Branded Spirit Wear and Apparel

Educational Outfitters in Farmington, MI will partner with OLS as sole provider of OLS spirit wear and apparel. This will ensure our brand is honored and will also reduce the need for us to house any inventory. This will also increase the number of items available to both parish and school families, while also giving back a percentage of sales to OLS on an annual basis. Items are purchased directly through Educational Outfitters.