



**Catholic School  
Endowment  
Challenge**

Kick-Off Meeting:  
Thur, April 19, 2018 at 7 pm EST | 6 pm CDT

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**Welcome**

- ▶ Introduction of presenters
- ▶ Welcome by UPCF board member

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**Prayer for Formation of Spirit-Filled Evangelizers**

O Holy Spirit come into my life and my heart. By the fire of your love, transform me and all Catholics throughout Michigan's Upper Peninsula into Spirit-filled evangelizers.

I pray that more and more people may come to know the love of Jesus Christ and make a personal decision to follow him. I pray for all the people that I know who are not practicing any faith. Touch their hearts with your love, O Holy Spirit.

Work through me so that they may have a personal encounter with Jesus Christ and follow him in faith. To you, O Holy Spirit, and to the Father and to the Son, be glory and honor for ever and ever, Amen.

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## Agenda

- 40 minutes**
  - Goals
  - Parameters
  - Get Started
  - Timeline
  - Strategies That Work
  - Prospects
- 20 minutes**
  - What to Expect Next
  - Q & A
  - Contact Info

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## Challenge Goals

1. Continue annual income stream
2. Establish/grow endowment
3. Identify, cultivate & foster stewardship of donors

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## Parameters

1. Endowments will be held in the Upper Peninsula Catholic Foundation (UPCF)
2. Your endowment fund must have a broad purpose that supports the school

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**Parameters**

**3. Choose**

- Option 1: Add to an existing fund in the UPCF
- Option 2: Start a new fund in the UPCF
- Option 3: Move an existing endowed fund into the UPCF

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**Parameters**

**4. Set a campaign goal and plan that maximizes your fund raising potential**

**5. \$500 minimum gift is suggested (consider gift cap as well, to maximize # of donors)**

**6. Leadership kits provided**

- Committee responsibilities
- Customizable brochure
- Letter templates

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**Parameters**

**7. UPCF role**

- Fund Agreement & Bylaws
- Online giving account

**8. Cash received by UPCF qualifies**

- Payment to the Challenge fund when goal met & cash received
- Payment made after Nov. 1, 2018 and by Dec. 31, 2018

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### Parameters

9. First UPCF distribution in July 2019
  - Annual distributions based on 12/31 fund balance
  - Based on the latest UPCF spending (4.5%)a fund balance of **\$110,000** resulted in **\$4,141**
10. Leadership commitment
11. A new diocesan Catholic School Endowment Fund in the UPCF will assist schools by accepting gifts to benefit all schools, and distributing in equal portions.

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### How to get started

1. Attend/view kick-off meeting together. Appoint a campaign committee. Determine best option.
2. Submit Challenge application by June 1. Visit <https://form.jotform.com/80856427924163>
3. Begin asking when your Challenge application is approved.

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### Timeline

8 (short) Months:

- Now Pre-campaign Planning
- By June 1 Submit Application (*or sooner*)
- By August 1 Begin Solicitations (*or sooner*)
- By Dec 31 Receive \$100,000 Challenge Gift

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### Strategies that Work: Endowment vs Annual Campaign

#### Endowment

- ▀ Future (Visionary)
- ▀ Focus on Pyramid Tip
- ▀ Larger, stretch goal
- ▀ Face to Face
- ▀ Sequential Solicitation
- ▀ Planned Gifts
- ▀ Commitment to Give

#### Annual

- ▀ Current (Maintenance)
- ▀ Focus on Pyramid Base
- ▀ Moderate goal
- ▀ Direct Mail
- ▀ Solicit All at Once
- ▀ Cash Gifts
- ▀ Immediate Gifts

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### Strategies that Work: Making the Ask

- Face-to-face, Team of two
- Small group gathering
- Tributes (memorial or honorary)
- Special event
- Personal "Door Opener" letter with telephone follow-up
- Use prospect folder

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### Let's identify some prospects!

1. Name your most individual enthusiastic school supporter
2. Name a group that supports the school
3. Name a person that can give \$500 or more
4. Name a person that has given \$1000 or more to your school
5. List a local family with several generations that could join together to make a major family gift

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### Let's identify some prospects!

- 6. Name a Catholic school supporter that is near a milestone birthday or anniversary
- 7. Name a current school donor who gives \$300 or more annually
- 8. Name a person who has mentioned legacy giving to you
- 9. Name regular, consistent givers to your parish Ash Wednesday collection
- 10. Name a retired Catholic school teacher or administrator

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### What to expect next

- Follow Up with Pastor/Principal
- Leadership kit (thumb drive) and solicitation folders
  - Phone call within one week from today
  - Site visit, deliver solicitation folders
  - Options for personalized assistance

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### Next...

UPCF will set up your fund and create online giving upon approval of your application

We promise to work in partnership with you until your fundraising goal is met

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Next...

All schools are encouraged to continue growing their endowment fund!

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*Back of letter - page 2*

April 2018

Dear Catholic School Supporter,

The Catholic Church in the Upper Peninsula has an awesome mission to witness to and proclaim the Good News of Jesus for all people. Our nine Catholic schools are an effective tool for the parishes to evangelize families. Securing the long-term financial stability of our Catholic schools is vitally important.

It is with deep gratitude for your past support of the church's mission for Catholic education that you are being invited to address the Good News of Catholic schools by investing in the education of our Catholic school students. The Catholic School Endowment Challenge offers you an extraordinary, value-added opportunity to make a permanent, secure endowment gift.

This challenge requires each of the nine schools to raise new gifts for an endowment dedicated to their local Catholic school in order to receive \$100,000 from the Diocese of Marquette. All endowments will be held in the Upper Peninsula Catholic Foundation and have a broad purpose that supports the local school. However, schools have several options for establishing their endowment and setting fundraising goals. Diocesan staff will provide campaign assistance, customizable campaign resource materials, and hands-on coaching to those who accept the challenge of building their school's endowment fund.

You might wonder how the Diocese of Marquette can afford this major gift to schools, or why we don't simply transfer the funds to set up the endowments. First, the diocese has been giving annual amounts to the schools for several years now from unrestricted accounts temporarily earmarked for the schools. The challenge gift comes from those unrestricted accounts. The new endowments serve to permanently restrict the funds for Catholic schools. Second, achieving financial stability is not a "new and novel" deal. It will take ongoing stewardship and development. Each school's endowment provides a growing, steady base that it can count on, even in difficult financial times. The challenge motivates major gifts for endowment growth.

For those who may not identify with a particular local school, but wish to support Catholic education in the diocese, a Catholic School Endowment Fund has been set up that will provide annual grants in equal portions to each school. While gifts to this fund do not count toward individual school challenge goals, they do help to build up endowment for the long-term support of all Catholic schools in the Diocese of Marquette.

We ask you to gratefully consider your support. Ask for the guidance of the Holy Spirit to discover how God is calling to you to respond to this challenge invitation.

God bless you for your stewardship of His Church!

Sincerely,

*John F. Doerflinger*      *Patricia Rudben*  
 Most Reverend John F. Doerflinger, STD, JCL      Patricia Rudben, President  
 Bishop of Marquette      Upper Peninsula Catholic Foundation, Inc.

2018 Marquette, MI 49801  
 PO Box 322, 8700 Oak Drive  
 www.upcatholicfoundation.org      www.upcatholicfoundation.org

Horizontal lines for handwritten notes.

**2018 Catholic School Endowment Challenge Why?**

**Why?**

We are grateful to have 90,000 Catholics who are dedicated to faith and prayer in the Upper Peninsula. Our nine Catholic schools are an effective tool for the parishes to evangelize families. Securing the long-term financial stability of our Catholic schools is vitally important.

**What Provides Does Your Gift Help?**

Endowment gifts provide a permanent, secure source of income for your local Catholic school. The funds are invested in a diversified portfolio of assets that will grow over time. The funds are used to support the school's operating expenses, including salaries, benefits, and materials. Your gift also provides a steady base that the school can count on, even in difficult financial times.

**Other Schools' Endowment Values**

Upper Peninsula Catholic Foundation

**ACT NOW!**

1. Complete the endowment challenge form and return it to the Upper Peninsula Catholic Foundation, Inc. by the deadline of April 30, 2018.

2. Make the endowment gift to the Upper Peninsula Catholic Foundation, Inc. by the deadline of April 30, 2018.

3. Receive the endowment gift to the Upper Peninsula Catholic Foundation, Inc. by the deadline of April 30, 2018.

4. Receive the endowment gift to the Upper Peninsula Catholic Foundation, Inc. by the deadline of April 30, 2018.

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9. Receive the endowment gift to the Upper Peninsula Catholic Foundation, Inc. by the deadline of April 30, 2018.

10. Receive the endowment gift to the Upper Peninsula Catholic Foundation, Inc. by the deadline of April 30, 2018.

Horizontal lines for handwritten notes.

*[Color options - template]*

Suggestion: Use this as a "door opener" letter. Mail it, and the follow up within 2 weeks with a personal contact. Ask if they would be willing to visit with you and another committee member. At the visit, use the prospect folder with campaign materials, and ask for a gift.

**[DATE]**

**[FORMAL NAME] - i.e. Mr. and Mrs. Robert Democh**  
**[ADDRESS]**  
**[CITY], [STATE] [ZIP CODE]**

Dear **[INFORMAL OR PREFERRED NAME]** - i.e. Bob and Renee:

We are writing to let you know about an exciting Catholic School Endowment Challenge offered by Bishop John Deroche in partnership with the Upper Peninsula Catholic Foundation. We have an extraordinary opportunity to receive a \$100,000 gift to boost endowment building. Proceeds are dedicated exclusively and forever for **[SCHOOL NAME]**. All gifts, including YOURS given to this endowment fund will provide annual income for our future *in perpetuity!*

As a longtime generous **[donor/ alumni]** of **[SCHOOL NAME]**, we know that you share our hopes that **[SCHOOL FULL NAME]** or **[YOUR CITY]** will continue to be a strong provider of Catholic education for the children in our community for generations to come.

We are grateful to those whose faith and generosity created our Catholic legacy, and now it is our turn to "pass it on." To sustain valued Catholic school education in our community we need **YOUR HELP!**

We will be calling you in the next **[TIME FRAME - one or two weeks?]** to follow up and set a time to meet with you personally to answer any questions you may have.

Please keep us and the Catholic School Endowment Challenge initiative in your prayers. Thank you for your continued interest and support of **[YOUR SCHOOL]**.

May God bless you and your family!

**[SIGNATURE]** *Blue ink is good for signatures* **[SIGNATURE]**  
**[PASTOR NAME, TITLE]** **[PRINCIPAL NAME, TITLE]**

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### Your Diocesan & Foundation Team

Renée Deroche, Catholic School Advancement Coordinator  
 Ph 906/373-9707 | Email [rderoche@dioceseofmarquette.org](mailto:rderoche@dioceseofmarquette.org)  
 or 800/562-9745 ext# 161

Terri Gadzinski, Exec Dir Stewardship & Development and UPCF  
 Ph 800/562-9745 ext# 108 | Email [tgadzinski@dioceseofmarquette.org](mailto:tgadzinski@dioceseofmarquette.org)

Angelina Juidici, Administrative Assistant  
 Ph 800/562-9745 ext# 156 | Email [ajuidici@dioceseofmarquette.org](mailto:ajuidici@dioceseofmarquette.org)

Kristi Flohe, Dir of School Finance  
 Ph 800/562-9745 ext# 138 | Email [kflohe@dioceseofmarquette.org](mailto:kflohe@dioceseofmarquette.org)

Mark Salisbury, Superintendent  
 Ph 800/562-9745 ext# 127 | Email [msalisbury@dioceseofmarquette.org](mailto:msalisbury@dioceseofmarquette.org)

Cassie LaTourneau, Administrative Assistant  
 Ph. 800/562-9745 ext# 137 | Email [clatourneau@dioceseofmarquette.org](mailto:clatourneau@dioceseofmarquette.org)

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