

Piarist Fathers, U.S.A. Province, Inc. Development Plan

I. Mission Statement

The mission of the USA Province of the Piarist Fathers is to follow Christ and to serve the Church in the modern world by promoting our unique way of life and by ministering effectively to the educational needs of children and youth, especially the poor. (Revised 6/9/01)

II. GOAL

To provide financial assistance for the formation and education of seminarians, for the health and well being of senior members and for the on going work of the active members.

III. OBJECTIVE

To create an integrated development program by initiating new program components and strengthening existing development efforts in order to raise \$200,000 over the next four years (August 2009 through July 2012).

IV. ACTION STEPS

- 1) To create and regularly review the CASE file:
 - Mission Statement
 - Goals (desired achievement)
 - Objectives
 - Programs (stories regarding service to people)
 - Governing Board (character and quality of organization)
 - Staffing (qualifications and strengths)
 - Facilities and Equipment
 - Finances (validate need for philanthropy)
 - Planning and Evaluation
 - History
- 2) To create and further develop a Development Team.
 - To identify members of the team.
 - To create and revise job descriptions of the members of the team.
 - To meet every other month, either in-person or by way of a conference call.
- 3) To formulate a marketing plan to generate enthusiasm for the mission and ministries of the Piarist Fathers USA Province.
 - To develop and regularly update a website for the USA Province.
 - Mission Statement

- Members and Ministries
 - Vocations Office
 - Initial Formation
 - History of the Order and Province
 - Development Office
 - Solicitation of on-line donations
 - Option for guests to the website to be added to our data base of donors
 - Links to Piarist related information (Order, Provinces, ministries, publications)
 - Provincial Newsletter, Annual Report of the Development Office
 - The web master of each Piarist related work will be asked to include a link to the Provincial website in an appropriate location.
 - The editor of the Newsletter(s) for each Piarist related work will be asked to include the address of the Provincial website in each issue.
 - To publish a Provincial Newsletter.
 - The Newsletter should be delivered by mail or e-mail, depending upon the desire of the addressee.
 - Every issue of the Newsletter should include information from the Development Office (stories, upcoming events, annual appeal).
 - Every issue of the Newsletter should be available by way of a link on the website.
 - To publish the Annual Report of the Development Office.
 - The Annual Report should be delivered by mail.
 - Every issue of the Annual Report should be available by way of a link on the Provincial website.
- 4) To form a Development Advisory Board.
- To identify and invite potential members of the Board, including its officers.
 - To develop a set of By-Laws for the Board, including a job description.
 - To convene the Board at least once a year or as needed.
 - To involve the Board in the annual appeal, especially the major gifts program.
- 5) To educate, involve and update membership in the ministry of development.
- To encourage members to take an active, up-front role in development. Potential donors will be more likely to respond positively to a Piarist than to a lay person.
 - To solicit advice from the members regarding development.
 - To inform the members about general development activities through the Newsletter.
 - To inform the members about more specific development activities every other month, shortly after the meeting of the Provincial Congregation.

- To give a report of the Development Office to the members on the occasion of the annual meeting.
- 6) To conduct the annual appeal, following the Fund Raising Cycle suggested by Henry A. Russo and Associates (See Appendix).
- To create the Annual Fund Gift Range Chart (See Appendix).
- To develop a list of potential donors (See Appendix):
 - Members of the Development Advisory Board
 - Recommendations for Major Gifts from the Development Advisory Board
 - Friends and relatives of the Piarists
 - Alumni of our schools in the USA and elsewhere
 - Beneficiaries of our other ministries, including the parishes
 - Business partners
 - Co-workers in our schools and ministries
 - Members of the Piarist Guild, Serra Clubs, and Knights of Columbus
 - Names of donors from local parish appeals
 - Names of donors from the Provincial website
- To ensure that all potential donors in our database receive a copy of the Provincial Newsletter, either by mail or by e-mail.
- To conduct a major gifts program.
 - To identify and invite someone to serve as the Chairman of the Annual Fund.
 - Using the Annual Fund Gift Raising Chart, to solicit a major gift from the Chairman of the Annual Fund and all members of the Development Advisory Board.
 - Using the same chart, to solicit major gifts from those potential donors identified by members of the Development Advisory Board.
 - A Piarist must make all solicitations for major gifts in person. If a potential donor is not a close associate of a Piarist, then the “link” to that donor must also be present for the solicitation. The solicitor must bring with him a copy of the CASE statement and any documentation, which might help validate the request for a major gift.
 - An appropriate letter of appreciation and thanks should be sent to the donor within 48 hours.
- To conduct the direct mail program.
 - To prepare, print and mail the materials for the Annual Fund direct mail program.
 - Cover Letter – Fund Raising for Small Non-Profits, ch. 7, page 10.
 - Reply Device - Fund Raising for Small Non-Profits, ch. 7, page 9.
The reply device should include the possibility of matching gifts from an employer.
 - To solicit the assistance of volunteers for mailing the materials. The volunteers can include but not be limited to Piarist priests and seminarians and students seeking Community Service hours.
 - An appropriate letter of appreciation and thanks should be sent to the donor within 48 hours.

- 7) To conduct special events with a focus on relationship building among our alumni, co-workers, business partners and friends.
 - To continue to support the efforts of the Assistant Development Director for Hispanic Fundraising.
 - To determine, organize and host events, which will be held in order to strengthen the relationship between the Piarists and specific groups of potential donors.
 - Each community will host at least annually a dinner for priests from the local parishes and ministries on an occasion celebrating any one event in the life of our Order. It would be helpful if one or more members of the Provincial Congregation attend each event.
 - Each community will celebrate in November a Mass for our living and deceased benefactors. Information regarding these Masses will be included on the Provincial website and the Provincial Newsletter. In addition, the community may wish to mail invitations to its annual Mass. It would be helpful if one or more members of the Provincial Congregation attend each Mass.
 - Each community will host small gatherings for our benefactors. This gathering may or may not be held on the occasion of the annual Mass. It would be helpful if one or more members of the Provincial Congregation attend each gathering.
 - The Provincial Congregation should consider awarding a Letter of Fraternity to donors who have assisted our mission through a sufficiently large major gift or a sufficiently large bequest in their will. The names of any recipients of the Letter of Fraternity should be recognized on the Provincial website, in the Provincial Newsletter and in the Annual Report of the Development Office.

- 8) To initiate fundraising from parishes.
 - Each local community will annually request benevolent local pastors to allow a Piarist to speak at all of the weekend Masses on behalf of the Province.
 - The Development Office will provide an insert, which may be included in the parish bulletin one week prior to the appeal.
 - The Development Office will also provide a reply device.
 - Each Rector or Treasurer will forward funds raised during these appeals to the Provincial Treasurer.
 - Members will be asked to cooperate with the Mission Office of the Province.
 - The Director of the Mission Office will forward funds raised during these appeals to the Provincial Treasurer.

- 9) To initiate funding from foundations and corporations.
 - To develop a list of foundations and corporations which may donate to our mission. Recommendations for potential donors:

- From the members of the Development Advisory Board, the members of the Piarist Order, our alumni, our beneficiaries, our benefactors, our business partners, and our co-workers
 - From websites
 - From publications on philanthropic giving
- Funding from foundations and corporations does not have to be limited to direct monetary donations. Some companies will consider in-kind services (printing, mailing, catering, volunteers). Other companies will match donations from its employees.

10) To initiate a planned giving program.

- Planned giving is the top level of the Donor Pyramid (See Appendix).
- Ideally, solicitation for planned giving should be made by a Piarist and, if necessary, by a “link”.
- When a donor states the intention of including the Piarists in their will, then the donor should be encouraged to have their own lawyer make the necessary provisions.
- The opportunity to donate through planned giving should be mentioned on the Provincial website, in every Provincial Newsletter and on the reply device from our direct mailing program.
- Those who have designated the Piarists in their will should be invited to any appropriate special event sponsored by our Province or by a local community.

(Revised: June 5, 2009)