

School Advancement Series

Creating a School Advancement Calendar

What do you hope to gain?

- **Create an annual overview of Business Team tasks to help guide individual committees and the Executive Committee**
- **I am hoping to gain tools to use for planning and marketing**
- **How to manage an advancement calendar with limited help**
- **How to set up Specific, Measurable, Achievable, Realistic, and Timely one year, three year and long term Advancement goals for Business Team**

What do you hope to gain?

- I would like our School Advancement to be more productive
- Creating an effective calendar for marketing purposes
- I would like our SAP to be more than planners for our signature event and to grow enrollment
- A holistic look at a year of advancement work
- Help with understanding the calendar that was created for me

Objectives

After this session, attendees will be able to:

1. Make a cohesive advancement calendar
2. Learn how development and fundraising informs marketing
3. Understand that advancement is ongoing.....

**Everything begins with
your purpose
(mission/vision) and
core values!!**

Know the Difference

Advancement: Moving your school from where you are, to where you want to be; **FILL** (enrollment management), **FUEL** (development), **FUND** (fundraising).

Development: The strategic process by which schools identify, cultivate, solicit, recognize, and steward prospects and donors to establish and nurture relationships and to raise resources.

Fundraising: Any activity that brings dollars to your school (appeals, campaigns, grants, events)

Basic First Steps

- 1. Assess past performance**
- 2. Define goals**
- 3. Update your “why” - why should families enroll, why should donors give (UVP)**
- 4. Identify fundraising methods**
- 5. Develop a dedicated strategy for engaging donors**
- 6. Prepare your marketing channels**
- 7. Determine and assign responsibilities**
- 8. Repeat**

Getting the WORD OUT..

A few words on MARKETING:

- All marketing efforts aim to increase brand awareness, educate the audience, engage the audience and lead to the desired outcomes.
- All marketing efforts should be informed by the overall advancement plans and goals.
- A combination of traditional marketing, digital marketing, and in-person events should be utilized.

Before you start....

Have you done the following:

- **Determined advancement key dates (signature events, open house, stakeholder activities) and confirmed with parish/school/community calendar?**
- **Matched school needs with possible donors (based on opportunities, impact, outcomes)**
- **Determined your fundraising needs based on your budget?**
- **Met with your school business team/board and staff and discussed work plans for development (including enrollment management, alumni and community relations), fundraising, and marketing: what needs to be done, what are the deadlines, who will be responsible?**

Before you start....

Have you talked about how you will...

Create connections?

Encourage engagement?

**This is at the core of all of your advancement.
Advancement tells the story of your school.**

Let's Take A Look At An Advancement Calendar:

- [Sample Advancement Calendar](#)

Resources

- [Sample Advancement Calendar](#)
- Donaldson, F. (2019) *25 Lessons Learned in 25+ Years in Catholic School Development*. NCEA
- [Advancement Summer Checklist: Healey Foundation](#)
- [Enrollment Management Workbook: Level 1](#) (Felicia Holcomb)
- [How to Succeed at Digital Marketing for Nonprofits](#)
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Questions?



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School Advancement Series

Elevating Your Signature Event : Sept. 19th, 9:00-10:00 am

Elevating Your Signature Event: Sept. 27th (evening session) 6:30-7:30 pm

Engaging Families During National Catholic Schools Week: Oct. 24, 9:00-10:00 am

Budget Timeline & Forecasting: Nov. 21, 9:00-10:00 am

Enrollment Season Process & Timeline: Dec. 18, 9:00-10:00 am

All via ZOOM