



Annual Appeal

Looking Ahead to the Education Freedom Tax Credit

About Fiat Development

- **Bill Maloney – President and Founder**
 - **Member of Queen of the Holy Rosary, OP**
 - **Board Member – Bishop Miege High School**
 - **Parish Council President – Queen of the Holy Rosary, OP**
 - **Two-time parish campaign chair at Queen, OP**

About Fiat Development

- **Bill Maloney – President and Founder**
 - **23 years of Catholic fundraising experience**
 - **14 years of Catholic capital campaign experience**
 - **Raised over \$115 million for diocesan and parish campaigns**
 - **Managed Archdiocesan Call to Share**
 - **Executive Leadership Team – Prior Firm**
 - **Managed a team of 12 campaign managers**

Annual Appeal Basics

It starts with your Mission

- What is your Mission Statement?
- Have you reviewed it lately?
- Do the teachers, students, and parents know it?
- Does it drive everything you do?

Annual Appeal Basics

Who we are

- Who do you serve?
- How many students?
- Student/Teacher Ratio
- Catholic Identity

Annual Appeal Basics

Why does Catholic Education Matter?

- Your school is a parish ministry
- Combines faith formation with Academic Excellence
- Catholic Values-driven environment

Annual Appeal Basics

Tuition vs. True Cost of Education

- **Three-legged Stool**
 - **Tuition**
 - **Parish Subsidy**
 - **Fundraising**

Annual Appeal Basics

Why is an Annual Fund Important?

- Keeps Tuition Affordable
- Broadens reach beyond events
- Creates an ongoing cash flow with recurring gifts
- Strengthens your donor database
- Promotes school to new families
- Offers tax-advantaged ways to give

Annual Appeal Basics

Who gives to an appeal?

- Parishioners
- Parents
- Past Parents
- Alumni
- Grandparents
- Friends of the school

Annual Appeal Basics

Leadership Gifts

- **60-70% of gifts from the leadership level**
- **Leadership gifts inspire others to give**

Who are my leadership-level donors?

- **Work with your pastor(s)**
- **Past event participation**
- **Referrals**

Annual Appeal Basics

How do I approach my leadership-level donors?

- **Pick up the phone**
- **Invite them in for a tour**
- **Ask what drives their support**
- **Listen**
- **ASK**

Annual Appeal Basics

Strive for broad participation

- **100% board participation**
- **80% parent participation**
- **Set goal to grow parish, alumni and friends each year**

Annual Appeal Basics

Have a multi-channel approach

- **Direct Mail**
 - **It still works**
 - **Ask for pastor participation**
- **Email**
- **Social Media**
 - **Student and family stories**

Annual Appeal Basics

Stewardship of Gifts

- **Acknowledge gifts quickly**
- **Send personal thank you notes**
- **Send student thank you notes**
- **Publish impact stories**
 - **Education success**
 - **Evangelization stories**
 - **Teacher impact**

Annual Appeal Basics

When is the best time for an appeal?

- **It is a year-long process**
 - **Leadership gifts**
 - **Fall kick-off**
 - **Parents**
 - **Parishioners**
 - **Alumni**
 - **Continual follow-up throughout the year**

Education Freedom Tax Credit

Great Opportunity to Begin an Appeal

- May not last forever
- Help you identify support and build database

Education Freedom Tax Credit

No brainer for supporters of Catholic Education

- Redirects Federal Tax dollars to your school
- Federal Tax Credit to support K-12 schools
- Dollar-for-Dollar reduction in Federal Taxes

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- Dollar-for-Dollar reduction in Federal Taxes
- \$1,700 max per individual
- \$3,400 for a married couple (pending clarification)

Education Freedom Tax Credit

How it Works

- **Gifts must be made to a Scholarship Granting Organization (SGO)**
- **SGO for the Archdiocese of Kansas City in Kansas is the Catholic Education Foundation**
- **CEF will process the tax credit documents and scholarship applications**
- **CEF will distribute gifts to schools at least twice a year**

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Education Freedom Tax Credit

Educate your Community

- **Now through the end of 2026**
 - **Newsletters, bulletins, hosted events**
 - **Customize for your school**
 - **Targeted mailings**

Education Freedom Tax Credit

Prepare for a Direct Mail Campaign

- **Organize your database**
 - **School and Parish**
- **Prepare Materials**
 - **Letter**
 - **School-specific brochure**
 - **Required form from SGO**
 - **Reply envelope**

Questions