



# ADVANCEMENT OFFICE 102

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Presentation by

**James S. Friend, Jr.**

Director of Development, Diocese of Allentown

and

**Barbara Ann Shotwell**

Asst. Director of Development. Diocese of Allentown

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# Tools To Succeed

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- Appropriate workspace
- Commitment to Professional Development
  - AFP/Advancement Day/Franklin Forum
- Adequate hardware/software
  - Database/Publishing



# Tools To Succeed contd.

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- Research Resources
  - Wealth Engine/Foundation Center/Media
- Meet faculty/staff
- Meet Board



# WHAT DO I DO FIRST??

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- Review fundraising/marketing history
  - Annual Appeal
  - EPSF
  - Newsletter, brochures, website
  - Major/Planned gift programs
  - Special Events
  - Grants
  - Other small fundraisers



# Evaluate Alumni/Parent Engagement

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- Updated List
- Engagement Activities
  - Personal visits
  - Events
  - Social Networking



# Review Marketing Strategies

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- Types of communications
  - Newsletter
  - Email
  - Brochures
  - Press Releases
  - Website
  - Social Network



# PLAN TO WORK WORK THE PLAN

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- Set Realistic Goals
  - # donor visits
  - # communication touches (newsletters, etc.)
  - # new prospects identified
  - \$/# gift increases
  - % increase in avg gift
  - Costs vs. ROI



# Make a Timeline

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- Annual goals
  - Monthly action steps



# Make a Budget

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- Income
  - Gifts/Bequests/Grants
- Expenses
  - Mailing/Printing Costs
  - Postage
  - Office Supplies/Copies
  - Food
  - Travel
  - Equipment



# Measure Success

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- Monthly activity report to Principal/Board
- Monitor progress toward goals