Partners in Mission

Advancement and Leadership Services for Catholic Education

PRESENTS THE:

National Advancement Summer Institute for Catholic Schools™

#PIMSI

America's Premier Advancement Experience for Catholic Schools

Boston, Massachusetts • Sunday, June 25 to Thursday, June 29, 2017

Two Great Conferences — Select One; Learn from Both

The National Enrollment Management Conference for Catholic Schools™

A national conference exclusively for Catholic Elementary and Secondary Schools offering proven strategies to ensure sustainability, affordability and accessibility of Catholic Schools.

Acquire the techniques, tools and strategies to make an immediate impact in your school's admissions effort.

In depth presentations will explore the strategy of Enrollment Management — moving prospective students through the enrollment management funnel from inquiry to graduation and everything in between.

The National Advancement Conference for Catholic Schools™

Experience five intense days of learning, sharing, and fun with friends and colleagues from across America and return home with the wisdom, tools, plans and support you need to advance your program to a whole new level of success.

Centered in our faith and the mission of Catholic education, this experience promises renewed energy and rekindled passion for you and your important work in our Catholic Schools.

HOT TIP!
2016 Conference Sold Out by May 1

SHARED CONFERENCE ATTRACTIONS

- "Taste of New England" Welcoming Reception
- Evening Harbor Cruise
- "Take Me Out to the Ballgame" join us for an evening at the home of the "2013 World Champions" Boston Red Sox, Fenway Park vs. the Minnesota Twins
- Guided Trolley Tour of Historic Boston
- Visit to "The Black Rose," Boston's Favorite Irish Pub

Strategic Partners:

H&A | HABEEB & ASSOCIATES ARCHITECTS

FACTS A nelnet company

Finalsite web solutions for schools

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CATHOLIC INVESTMENT SERVICES

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SchoolAdmin

The Cambridge Institute of International Education

The National Enrollment Management Conference for Catholic Schools™

IN DEPTH PRESENTATIONS will explore the science and strategy of Enrollment Management — moving prospective students through the enrollment management funnel from inquiry to graduation and everything in between.

Sunday, June 25 to Thursday, June 29

Boston Marriott Quincy Hotel, Quincy, MA

Topics Include

- Assessing Your Inquiry/Response System
- Communications – Personal, Print, Media, Web
- Engaging Faculty in Recruiting and Retention
- Engaging Your Parents in Admissions
- Enrollment Management for Advancement Directors
- Expanding Your Applicant Pool
- Facebook, Twitter and More: Social Media Strategies
- Managing Paper, Data and Applicants
- Open Houses
- Positioning/Competing with Other Catholic Schools
- President/Principal Role in Enrollment Management
- Recruitment and Retention Plans
- Recruitment of Non Catholics
- Retention Strategies
- Social Media in Admissions
- Student Shadow Programs
- Using Technology in Admissions
- Welcoming/Engaging Newly Accepted Families
- Your School from the Customer's Perspective

Who Should Attend

- Superintendents and Diocesan Leadership Teams
- Presidents, Principals, Assistant Principals
- Pastors and Heads of School
- Administrative Teams
- Directors of: Admissions, Recruitment, Advancement, Communications, Marketing, Athletics, Enrollment Coordinators
- Religious Community Leaders
- Board Members
- Business Managers

Why Should You Attend

- Catholic, Mission-Centered
- Experience and Success Dedicated Exclusively to Catholic Education
- Strategic Solutions for Catholic Schools
- People Skills, People Persons
- Varied and Targeted Topics
- Education and Entertainment
- Instant Network of Friends and Colleagues
- It's About the Experience
- Ask Any of our "Our" Alumni
- You'll Take Home More Than You Came With
- Huge Resource Manual (available for an extra charge)
- Enrollment Plan to Take Home

"ENROLLMENT MANAGEMENT FUNNEL"

THE NATIONAL ENROLLMENT MANAGEMENT CONFERENCE FOR CATHOLIC SCHOOLS SCHEDULE

SUNDAY, JUNE 25

Registration
3:00 to 7:00 p.m.

Opening Liturgy
6:00 p.m.

"Taste of New England" Welcoming Reception
7:00 p.m.

Approved Provider For CFRE™ 2017 Continuing Education

MONDAY, JUNE 26

DAILY LITURGY

MORNING THEME

Enrollment Management 101: "Success is in the Science"

Branding = Identity

- Being a Difference Maker: How to Revivify Your Brand with a New Life

General Marketing = Attention

- Developing Marketing Strategies to Meet Goals
- Communications: Personal, Print, Media, Web
- Budgeting / Justifying Expenditures
- Telling Your Story

— LUNCH —

AFTERNOON THEME

Target Marketing = Attraction

- Crafting Your Message for Your Intended Audience
- It's Just Me, Myself, and I: The Effective One-Person Admissions Office

Boston Harbor Cruise

TUESDAY, JUNE 27

DAILY LITURGY
— BREAKFAST —

MORNING THEME

Micro Marketing = Relationship

- Establishing a Connection: Securing Your Place in the Prospect's Mind
- Creating Affordable and Timely Pieces

— LUNCH —

AFTERNOON THEME

Recruitment = Action

- Event-Driven Recruitment
- The Role of the President/Principal in Recruitment
- Cultivating Prospects: Turn "Shoppers" into "Buyers"
- Be Our Guest: Guest-Centered Recruitment
- Five Steps to Increasing your Enrollment
- Building the Relationship via Information Nights, Open Houses, School Tours, and Student Shadow Programs
- Know the Competition: Strategies to Differentiate
- Making an Impact with Social Media

Boston Red Sox vs. Minnesota Twins at Fenway Park

WEDNESDAY, JUNE 28

DAILY LITURGY
— BREAKFAST —

MORNING THEME

Application = Interest

- The Role of Enrollment Management in Advancement
- The Application: Asking ALL the Right Questions
- Enrollment by the Numbers: Setting Goals-Tracking Results
- Data Drives Strategy: Collection and Implementation
- Attract, Recruit, and Cultivate with Technology Tools

— LUNCH —

AFTERNOON THEME

Acceptance = Invitation

- Be Our Guest: A Welcoming First Impression
- Financial Aid: Maximizing the Return on Investment
- The Role of the President/Principal in Enrollment Management

Enrollment = Decision

- FIT (Freshmen in Transition): Retention Begins at Enrollment
- Opportunities to Engage Parents at Point of Enrollment
- Linking Your Admissions and Business Office for Success

Trolley Tour of Boston and an Irish Party at The Black Rose

THURSDAY, JUNE 29

DAILY LITURGY
— BREAKFAST —

MORNING THEME

Retention = Fulfillment

- Retention Agents: Faculty and Staff
- Maintaining a Connection: Capturing Those Who Did Not Enroll
- Lessons Learned from an Experienced Admissions Officer
- Ten Things Catholic Schools are doing right to Leverage Affordability and Tuition Assistance
- It Takes a Village: Strategic Student Retention

Winning Strategies to Take Home

Closing Prayer and Commissioning Ceremony

Conference Evaluation

Conference concludes at 12 noon

— General Sessions and Breakout Sessions including Joint Sessions with the Advancement Conference Attendees —

The National Advancement Conference for Catholic Schools™

A strategic, results oriented, high energy four day conference designed specifically for seasoned Catholic High School and Elementary School advancement professionals and leaders who want to take their programs and team performance to the next level.

Sunday, June 25 to Thursday, June 29

Boston Marriott Quincy Hotel, Quincy, MA

Topics Include

- Advancement for Heads, Presidents and Principals
- Alumni are Forever: How to Keep Them in the Family
- Annual Fund: Build from the Ground Up
- Building a Culture of Philanthropy
- Building Effective Boards for Advancement
- Business of Raising Money
- Communications Programs
- Creating the Written Strategic Plan for Advancement
- Donor Stewardship
- Enhancing Your Annual Report
- Establishing a Major Gift Program
- Facebook, Instagram, LinkedIn, Twitter and More: Social Media Strategies
- Ministry of Advancement
- Planned Giving and Bequests Programs
- Planning for a Successful Capital Campaign
- Prospect Identification, Cultivation and Solicitation
- Prospect Research
- Role Playing the Ask
- Special Events
- Strategic Planning
- Volunteer Management/Governance

Who Should Attend

- Advancement Directors/Alumni Directors
- Presidents and Principals
- Board Members
- Communications Directors
- Diocesan Education Leaders
- Key Administrators & Volunteers
- Bring your advancement team! Best results occur when two or more attend from the same school.

Why Should You Attend

- 100% Faith and Mission-Centered Focus on Catholic Schools
- All New Sessions Designed for Today's Tough Challenges
- Personal, Private Time with our Partners to Address Your Issues
- Huge, Comprehensive Take Home Resource Manual and Plan (manual available for an extra charge)
- A "Best of Boston" Experience

THE NATIONAL ADVANCEMENT CONFERENCE FOR CATHOLIC SCHOOLS SCHEDULE

SUNDAY, JUNE 25

Registration
3:00 to 7:00 p.m.

Opening Liturgy
6:00 p.m.

"Taste of New England" Welcoming Reception
7:00 p.m.

Approved Provider For CFRE™ 2017 Continuing Education

MONDAY, JUNE 26

DAILY LITURGY

MORNING THEME

Advancement Operations

- Changing the Landscape of Philanthropy
- The Right Team: How Many Do I Need and Who Does What?
- New Advancement Directors: Five Secrets of Successful Newbies
- The President and Director of Advancement Relationship: Setting Expectations

— LUNCH —

AFTERNOON THEME

Annual Fund

- Developing a Leadership Giving Program
- Segmentation Techniques and Strategies
- Making Leadership Gift Personal Solicitations
- Using Challenge Gifts and Matching Gifts
- Team Crowdfunding: Bringing Advancement and Extra-Curricular Programs Together
- One Day Giving Campaigns

Boston Harbor Cruise

TUESDAY, JUNE 27

DAILY LITURGY
— BREAKFAST —

MORNING THEME

Capital Campaigns & Major Gifts

- Role Playing the Face to Face Ask
- What It Takes to Get a Mega Gift
- What Should be in Place Before You Start a Campaign?
- Is Your Campaign Feasible?
- Cultivating Your Top Prospects
- Family Philanthropy

— LUNCH —

AFTERNOON THEME

Planned Giving and Special Events

- Build a Legacy Philanthropy Program
- Using Planned Gifts to Build Endowment
- Stories from the Road – (Planned Giving) Vehicles to Get You There
- Best Tips for Auctions, Legacy Galas and Golf Tournaments
- Adding New Elements to Your Event Strategy

Boston Red Sox vs. Minnesota Twins at Fenway Park

WEDNESDAY, JUNE 28

DAILY LITURGY
— BREAKFAST —

MORNING THEME

Constituent Relations

- Social Media Strategic Plan for Engaging Alumni
- Parent and Grandparent Programs
- Class Agent Programs, Out... Affinity Groups, In
- Social Networking

— LUNCH —

AFTERNOON THEME

Communications

- Brand Management for Your School
- Persuasive Development Writing
- Elements of a "Powerful" Magazine/ Newsletters
- Rock Your School's Website
- Effective Writing for Advancement Professionals
- Don't Be Scared of E-Communications

Trolley Tour of Boston and an Irish Party at The Black Rose

THURSDAY, JUNE 29

DAILY LITURGY

MORNING THEME

Stewardship and Volunteer Management

- 100 Ways to Thank Your Donors
- Engaging Your Board in the Fundraising Process
- Identifying, Recruiting and Managing the "Right" Volunteers
- Like It or Not, It's Your Job: The Head and Fundraising

Winning Strategies to Take Home

Closing Prayer and Commissioning Ceremony

Conference Evaluations

Conference concludes at 12 noon

— General Sessions and Breakout Sessions including Joint Sessions with the Enrollment Management Conference Attendees —

Partners in Mission

Advancement and Leadership Services for Catholic Education

Our Mission

Partners in Mission, led by a team of dedicated professionals, firmly rooted in the ministry of Catholic education and inspired by the Spirit, is totally committed to advancing Catholic education by:

- Creating a community of strength for advancement, admission, communication and alumni professionals engaged in this ministry so critical for the future vitality of our Catholic Church
- Advancing excellence in best practices through educational programs and consulting services
- Enhancing professional development through networking and mentoring opportunities.

Summary of Services

Partners in Mission is a full-service consulting firm focused exclusively on developing excellence in Catholic school advancement and leadership. Our dedicated team of professionals partner with clients to advance their missions by providing comprehensive and effective solutions to address the challenges they face every day. Specializing in advancement program assessments, volunteer leadership, enrollment management, capital campaign management, annual fund segmentation, major gift solicitation, planned giving, stewardship, strategic planning and leadership training, among other related services, **Partners in Mission** offers proven strategies and practices to advance the mission of growth and excellence in Catholic schools, dioceses, religious congregations and parishes.

Our team has served over 400 Catholic schools and dioceses around the country in more than forty states. Our consultants are accomplished professionals who bring a wealth of experience to Catholic school advancement; many of us actually began their careers working at our high school alma maters. As partners among ourselves and with our clients' missions, we value, understand and embrace the importance of Catholic education in our personal and professional lives — and remain committed to ensuring its strength and vitality for years to come.

How We Can Help You

- Advancement Program Assessments
- Capital Campaign Feasibility Studies
- Capital Campaign Counsel and Management
- Board and Volunteer Leadership Training
- Major Gifts Counsel
- Planned Giving Programs
- Communications Counsel
- Strategic Planning
- Annual Fund Programs
- Stewardship
- Constituent Relations Programs
- Enrollment Management
- Branding
- Marketing
- Conversion Strategies
- Student Retention
- Student Recruitment

#PIMSI

Marriott

Accommodations at The Boston Marriott Quincy Hotel

A special conference rate of $187 per night (single or double occupancy) has been guaranteed at the Boston Marriott Quincy Hotel for rooms booked by Monday, June 6, 2017 based on availability. To arrange your stay, please call the hotel at (800) 228-9290 or 617-472-1000. The Boston Marriott Quincy Hotel is located at Exit 19A off I-93 and just 8 miles from Boston and 9 miles from Logan International Airport. The Boston Marriott Quincy Hotel offers the elegance and sophistication of a downtown hotel in a convenient suburban location. All public transportation is available at the hotel. The hotel website: www.marriott.com/quincy

HOT TIP!
2016 Conference Sold Out by May 1

2017 Conference Registration Form

Name_____ Title _____

Name_____ Title _____

Name_____ Title _____

Organization _____

Address_____

City _____ State _____ Zip _____

Telephone_____ Website Address _____

E-Mail _____

❑ Please reserve ____ place (s) for **The National Advancement Conference for Catholic Schools** from June 25 to June 29, 2017

❑ Please reserve ____ place (s) for **The National Enrollment Management Conference for Catholic Schools** from June 25 to June 29, 2017

❑ Check enclosed: $ _____

❑ Please send me additional information on other Partners in Mission services

Please make checks payable, and mail registration to **Partners in Mission, 124 Sycamore Drive, Westwood, MA 02090**.

AGAIN IN 2017! Breakfast and Lunch included in your Registration		JUNE 25–29 The National Advancement Conference for Catholic Schools	JUNE 25-29 The National Enrollment Management Conference for Catholic Schools
Early Bird Discount	(expires March 1)	$899	$899
Pre-Registration	(expires May 1)	$949	$949
Regular Registration	(expires June 1)	$999	$999
Late Registration	(after June 1)	$1,049	$1,049
Each Additional Registrant		$899	$899

—— Breakfast and Lunch Included ——

If you have questions, call Larry Furey at (781) 710-0242, lfurey@partnersinmission.com or Chris Hagerty at (814) 566-7500, chagerty@partnersinmission.com. You will receive confirmation upon receipt of your registration form and payment. Final conference information will be sent to you four weeks before the conference and will include full details on the conference's daily schedule and activities. **Visit our website for more information: www.partnersinmission.com**

Conference Registration & Fees

The fee includes post-seminar telephone consultation, refreshments, breakfast, lunch, dinner on Sunday and Monday evening and most evening events including event transportation. Accommodations are on your own. A $400 deposit is required for each individual who registers. Balance will be due 45 days prior to the conference. Register early, as previous conferences have sold out.

Refund Policy

Full refund (less a $100 administrative fee) if you cancel in writing 30 days prior to the conference. No refund will be made if your cancellation is received within 30 days of the conference. Partners in Mission reserves the right to change, modify or cancel any program or activity.

Bishop Joseph McFadden Scholarship Opportunities

Scholarships, named in honor of the late Bishop Joseph McFadden, are available to participants. Please send your registration form along with a letter describing why a partial scholarship will be important to your institution. Unfortunately, because of limited funds, we may not be able to assist everyone who applies.

KEYNOTE SPEAKER

Sr. Clare Fitzgerald, SSND

Founder and Director of the Catholic School Leadership Program at Boston College
Recipient of NCEA's St. Elizabeth Ann Seton President's Award and ACAAP's Lifetime Achievement Award

"Proclaiming Our Mission — Living Our Faith through Catholic Schools"

NEW THIS YEAR!

Leadership Strand for Presidents and Principals

Among the topics for discussion are:

- Sowing the Seeds of Leadership: Inspiring Future Catholic School Leaders
- The President and Director of Advancement Relationship: Setting Expectations
- Managing the Advancement Team
- Passport to Transformation: Building a Global Catholic School Community and Curriculum
- Essential Questions for Successful Catholic School Leaders
- Assembling an All Star Board
- The Role of the President in Advancement
- Understanding the President/ Principal Model
- Head of School Succession Planning
- Your First 100 Days as a New President or Principal – What Do I Do?
- The Board's Role in Major Gift Fundraising
- Recruit and retain Top Performers
- Storytelling – How to Tell the Story of Your School

Attendees comment on their Partners in Mission Conference

"... I am better at what I do because of what that Partners in Mission has shared..."

"The conference exceeded my expectations. Speakers were excellent. Topics excellent — Food excellent — Outings excellent — Printed pieces table excellent (overwhelming) — Starting sessions with rock music — FABULOUS — Offering cannoli's, cake, Red Sox perks to the little boy with his dad was over the top fun. — Love Larry and Chris presentations and comments to all of us."

Janet Flanagan, Director of Advancement, Bishop Heelan Catholic School System (IA)

"Once again, *Partners in Mission* provided an excellent conference in the area of enrollment guided by the mission of Catholic schools. As a participant for the third year straight, I came away with more insight into areas of enrollment which I can take back to school and implement into action. The *Partners in Mission* team is an incredible support system to us!"

Sue Ushela, Director of Admissions, Saint Joseph High School (IN)

"My expectations were exceeded! All of the presenters were informative and engaging. I brought back LOTS of ideas that can be quick wins, as well as some concepts that may take longer to implement. The personal touches were noticed and appreciated, e.g., chocolate covered strawberries, Larry being the person to hand out tickets and welcome attendees to the Odyssey cruise, etc."

Andrea Wills, Admissions and Marketing Coordinator, The Seton Keough High School (MD)

"It exceeded my expectations. From the moment I arrived the first day I noticed the overwhelming attention to detail, felt welcome from every team member by their smiles, extending a hand to me and their efforts at knowing myself and every other attendee. The conference announcement session were entertaining and sometimes hilarious and made the experience even better as the information sessions were jam-packed with valuable information, those comical breaks were a refreshing break for my brain. The sessions, presenters, parent panel were amazing, riveting and inspirational in many ways. The very best professional development experience of my life!"

Tammy-Rae Kennedy, Director of Development, Greater Woonsocket Catholic Regional School System (RI)

Meet The Partners in Mission Team and Conference Faculty

Larry Furey
Founder and Partner, Partners in Mission
Asst. Headmaster of Advancement
Xaverian Brothers High School (MA)
Larry is leading a $25 million capital campaign for Xaverian

Chris Hagerty
Senior Partner, Partners in Mission
Director of Strategic Initiatives
Cathedral Preparatory School (PA)
Villa Maria Academy (PA)
Chris has just secured a $10 million gift for Cathedral Prep and Villa Maria

Tom Brodnicki
Senior Partner, Partners in Mission
Vice President of Advancement (former) University of St. Francis (IL)
Director of Advancement (former)
St. Rita High School (IL)
Tom's 40 years in the field turns your capital campaign dreams into reality

Michelle Birkel
Director of Advancement (former)
Pius X High School and Foundation (NE)
Michelle has grown the Annual Fund for Pius X from $131,000 to $590,000 in seven years

Lauren Fredette
Director of Advancement (former)
Bishop Fenwick High School (MA)
Trinity Catholic High School (CT)
Lauren guided the Advancement Program at Trinity Catholic that raised $145,000 over budget and organized their first Legacy Gala that raised $133,000

Anna Miner
Director of Admissions (former)
Fontbonne Academy (MA)
Anna significantly increased enrollment at Fontbonne Academy in three years

Dennis Buckley
Vice President of Advancement
Archbishop Stepinac High School (NY)
Dennis has helped secure a $10,000,000 realized bequest

Russell Gartz
Chief Development Office (former)
St. Joseph's Preparatory School (PA)
Russell is focused on the art of building relationships with donors that lead to increased annual, capital and planned gifts.

Sr. Rita O'Leary, I.H.M.
Director of Planned Giving & Stewardship
Immaculata University (PA) and
Director of Advancement (former)
Bishop McDevitt High School (PA)
Securing Planned Gifts of all sizes makes Sr. Rita a gem for generations

Kathleen Casey
Associate Superintendent of Schools (former)
Diocese of Bridgeport, CT

Zane Gizzi
Associate Dean of Advancement
York College (PA)
Director of Advancement (former)
Lancaster Catholic High School (PA)
Zane built a Planned Giving Program at Lancaster Catholic second to none

Grace Regan
Head of School
St. Mary's High School (MA)
Executive Director of Advancement (former)
New England Province of Jesuits (MA)
Grace has introduced a new branding identity at St. Mary's

Jane DiGirolamo
Chief Advancement Officer
Our Lady of Good Counsel High School (MD)
Jane just completed a $10M capital campaign for Good Counsel, the largest in school history

Jennie Hagerty
Director of Advancement (former)
St. Jude the Apostle Church and Our Lady's Christian School (PA)
Jennie has built an advancement program that raises in excess of $500,000 annually

Br. Daniel Skala, CFX, Ph.D.
Headmaster
Xaverian Brothers High School (MA)
Br. Dan has assembled an "All Star Philanthropic Board of Trustees"

Cathy Donahue
Director of Enrollment & Marketing (former)
Catholic Schools of the Diocese of Bridgeport
Cathy is a brilliant strategic marketing professional

Maria Ippolito
Director of School Marketing and Communications (former)
Archdiocese of Chicago
Maria led the efforts around the development of the Archdiocese's very successful Parent Ambassador Program

Chris Stiles
Director of Advancement
Mount St. Mary High School (OK)
Chris has just completed a $4.4 million capital campaign.

Katie Doree
Director of Major Gifts (former)
Gonzaga University (WA)
Katie brings together a strong understanding of technology and its use within advancement strategies.

Mary Lund
Director of Advancement
Mercy High School (CA)
Mary raises over $400,000 at the special event each year

Bob Tift, Ed.D.
President (former)
Benilde – St. Margaret's School (MN)
Bob's expertise includes governance and Board development, and strategic planning

Hal Dupuy
Director of Advancement (former)
Catholic High School (LA)
Hal sees the value of a strong constituent relations program as the key to achieve the goals of the Annual Fund

Shana Ruffner Maguire
Director of Admission
Padua Academy (DE)
Shana will inspire and empower you to optimize your school's enrollment

Steven Virgadamo
Associate Superintendent for Leadership, Archdiocese of New York
Steven has consulted directly with hundreds of schools in almost half of the arch/dioceses of the United States.