Partners in Mission

Advancement and Leadership Services for Catholic Education

PARTNERS IN MISSION PRESENTS THE:

National Advancement Summer Institute for Catholic Schools™

BOSTON, MA • JUNE 21-25, 2020

#PIMSI

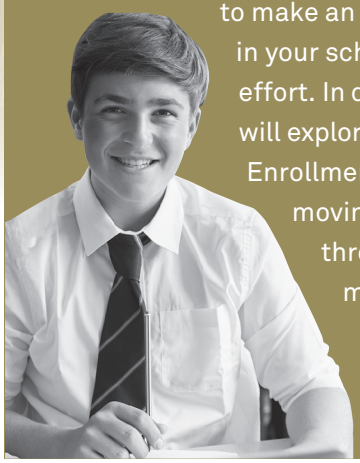
BOOK TODAY! 2019 Conference Sold Out Before May 1

Two Great Conferences: Select One, Learn from Both

America's Premier Advancement Experience for Catholic Schools

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.

Early Bird

$949 *Early Bird Price Frozen for 2020*

5,018

Colleagues who have attended our Boston Summer Institute

Evening Events

Taste of Boston Reception, Boston Harbor Cruise, Celebrate Catholic Education Dance Party with Hip Pocket Orchestra, and Trolley Tour are included with Registration

815

Conference Attendees who have attended at least a second time

Strategic Partners:

FACTS. ALUMNIFIRE NICHE DONORSEARCH

H&A HABEEB & ASSOCIATES ARCHITECTS

CATHOLIC INVESTMENT SERVICES

eTS eTeamSponsor.com AUTOMATED FUNDRAISING THAT WORKS

Finalsite

The National Enrollment Management Conference for Catholic Schools™

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

Sunday, June 21 to Thursday, June 25

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
- Expanding Your Applicant Pool
- Facebook, Twitter and More: Social Media Strategies
- Customer Service and Marketing Plans That Work
- 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
- 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
- Comprehensive Conference Resource (available for an extra charge)
- Enrollment Plan to Take Home

"ENROLLMENT MANAGEMENT FUNNEL"

THE NATIONAL ENROLLMENT MANAGEMENT CONFERENCE FOR CATHOLIC SCHOOLS SCHEDULE

SUNDAY, JUNE 21

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

Opening Mass
6:00 p.m.

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

Approved Provider For CFRE™ 2020 Continuing Education

MONDAY, JUNE 22

DAILY LITURGY

MORNING THEME

Enrollment Management 101: "Success is in the Science"

Branding = Identity

- Being a Difference Maker: How to Revive 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 23

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

Celebrate Catholic Education Dance Party with the 10-piece Hip Pocket Orchestra

WEDNESDAY, JUNE 24

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 25

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 21 to Thursday, June 25

Boston Marriott Quincy Hotel, Quincy, MA

Topics Include

- Advancement for 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
- 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 (available for an extra charge)
- A "Best of Boston" Experience

THE NATIONAL ADVANCEMENT CONFERENCE FOR CATHOLIC SCHOOLS SCHEDULE

SUNDAY, JUNE 21

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

Opening Mass
6:00 p.m.

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

Approved Provider For CFRE™ 2020 Continuing Education

MONDAY, JUNE 22

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 23

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

Celebrate Catholic Education Dance Party with the 10-piece Hip Pocket Orchestra

WEDNESDAY, JUNE 24

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
- Alumni Programs

— 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 25

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 800 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 $205 per night (single or double occupancy) has been guaranteed at the Boston Marriott Quincy Hotel for rooms booked by Tuesday, May 25, 2020 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

BOOK TODAY! 2019 Conference Sold Out Before May 1

2020 Conference Registration Form

Name_____ Title _____

Name_____ Title _____

Name_____ Title _____

Organization_____

Address_____

City _____ State _____ Zip _____

Telephone_____ Website Address_____

E-Mail _____

AGAIN IN 2020! Breakfast and Lunch included in your Registration		JUNE 21-25 The National Advancement Conference for Catholic Schools	JUNE 21-25 The National Enrollment Management Conference for Catholic Schools
Early Bird Discount	(expires March 1)	$949	$949
Pre-Registration	(expires May 1)	$999	$999
Regular Registration	(expires June 1)	$1,049	$1,049
Late Registration	(after June 1)	$1,099	$1,099
Each Additional Registrant		$949	$949

—— 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**

- ❑ Please reserve ____ place (s) for **The National Advancement Conference for Catholic Schools** from June 21 to June 25, 2020
- ❑ Please reserve ____ place (s) for **The National Enrollment Management Conference for Catholic Schools** from June 21 to June 25, 2020
- ❑ Please reserve a **Conference Resource Manual for $99** (Note: all presentations will be available on our MobileApp at the conference. The Conference Resource Manual includes all presentations PLUS 500+ pages of additional best practices and materials).
- ❑ 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**.

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.

INTRODUCING OUR KEYNOTE SPEAKER

Father Michael Martin, OFM Conv.

Director of Catholic Campus Ministry, Duke University – Durham, NC
(former President, Archbishop Curley High School, Baltimore, MD)

"2020 - Seeing Our Catholic Schools, Our Church, Our Children through the Eyes of Our Faith!"

Attendees Comment on their Partners in Mission Conference Experience

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

"Whether you are a seasoned advancement professional or new to the industry I cannot stress enough how important this conference is. You will walk away with best practices and new ideas and strategies but more important you will leave with a renewed since of purpose and will remember that the mission of Catholic education and our schools is what drives our work."

Amanda Goldsmith, Director of Advancement, Christian Brothers College High School, MO

"What a great conference! This event is truly a great return on investment! I cannot wait to get home and implement everything that I learned!"

Amy Thomason, Director of Advancement, Saint John Paul the Great Catholic High School, VA

"Partners In Mission gives great guidance, support , strategy and HOPE for our Catholic Schools. Focused on the central mission of sharing the good news and reaching hearts, minds and souls is the driving force of all that we do. Partners in Mission provides a realistic approach in our times to keep Catholic schools in the forefront in communities to keep the mission alive."

Ana E. Gomez, Principal, St. Mary's School, TX

"WOW!! As I was driving back home from the conference, (I was the passenger) I was already working on my Advancement Plan for 2019-2020 school year. I have a whole new way of looking at how to increase donors gifts to the school and hopefully motiving them to increase their gift. I am recharged, motivated and ready for the challenge!"

Cindy Corey, Director of Advancement, Regina High School, MI

"As an "Army of One", I was skeptical going into the conference. I had thoughts that this would be another wish list of to do's and ideas. I was wrong. For every program and process we already have in place, I learned new techniques to help them grow. There wasn't one session that I did not have an "ah ha" moment. Thank you, thank you, a job well done Partners in Mission!"

Diana Gatto, Director of Enrollment, Archdiocese of New York, NY

"Your mission to sustain, grow and love our Catholic Schools is embodied in every dynamic and informative session, in every smiling, dedicated team member who went out of their way to bring the best to their roles, and in every last detail of this outstanding conference experience. I could not have begun to imagine just how impressive and valuable this conference would be to me. It was the best...I can't wait to get going!"

Eileen Brida, Advancement Director, St. Anne School Bethlehem, PA

"This conference is the best Professional Development experience I have ever had. I left feeling knowledgeable, refreshed and ready to take on the school year!"

Jennifer Tolbert, Director of Advancement, Office of Catholic Education, Archdiocese of Mobile, Alabama

"The Partners in Mission team paid attention to EVERY SINGLE DETAIL. Your professionalism, your spirit, your kindness, and your focus on the mission are superb!"

Sister Mary Veronica Keller, O.P., Head of School, Saint John Paul the Great Catholic High School, Virginia

"We love Partners in Mission! They have changed our school for the better, and we are grateful to have had them as our consultants for three years. We have learned a ton, been inspired, laughed a lot, and made connections from across the country. I can't say enough good things about them."

Theresa Rodgers, President, St. Francis Catholic High School, CA

"You will learn quickly why their name is Partners in Mission - they are truly in the trenches with you so they know your battles and they are not afraid to walk alongside you because we can lift ourselves up more effectively together rather alone."

Carol Sue Scurti, Director of Marketing and Enrollment Management, Steubenville Catholic Schools, OH

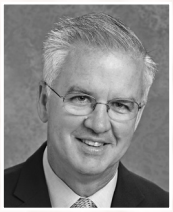
"This was my first Partners in Mission Conference and I would definitely return! Not only was the information plentiful and useful, but the execution made the experience faith-filled and fun! Thank you!"

Deanna J. Johnson, Director of Admissions, Bishop McNamara High School, MD

"I was very impressed with the Partners in Mission Team. They are educated, engaging, and truly passionate about what they do. The Partners in Mission Team is a visual example of Catholic Education being a family experience."

Gabby Schauer, Alumni Relations & Advancement Events Coordinator, Totino-Grace High School, MN

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 recently completed a $25 million capital campaign for Xaverian

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

Kathleen Casey
Associate Superintendent of Schools (former)
Diocese of Bridgeport, CT
Kathleen translates her strategic and marketing success in both corporate and academic settings to help Catholic school leaders optimize mission and margin.

Al Catelli
Director of Admissions (former)
Pope John Paul II High School (MA)
Al has 20+ years experience providing stability, growth, and long-term viability to Catholic elementary and secondary schools across the United States

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

Cathy Donahue
Director of Enrollment & Marketing (former)
Catholic Schools of the Diocese of Bridgeport, CT
Cathy is a strategic communications professional and dynamic coach for school leadership aiming to grow revenue.

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

Chris Hagerty
Senior Partner, Partners in Mission
Director of Strategic Initiatives (former)
Cathedral Preparatory School (PA)
Villa Maria Academy (PA)
Chris secured a $23 million gift for Cathedral Prep and Villa Maria Academy.

Zane Gizzi
Major Gifts Officer
Penn State College of Medicine (PA)
Director of Advancement (former)
Lancaster Catholic High School (PA)
Zane built a Planned Giving Program at Lancaster Catholic second to none

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

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

Kathy Link
Senior Director of Schools (former)
Healey Education Foundation (NJ)
Kathy helped develop, launch and train Boards of Specified and General Jurisdiction across the county

Mary Lund
Director of Advancement
Mercy High School (CA)
Mary raises over $400,000 at her school's Scholarship Luncheon each year.

Kevin Quinn
Vice President of Advancement (former)
Immaculata University (PA)
Kevin brings over 25 years of Catholic higher education experience to Partners in Mission

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 45 years in the field turns your capital campaign dreams into reality

Grace Regan
President
Boston College High School (MA)
Grace is the first female President of Boston College High School.

Shana Rossi
Director of Advancement
Padua Academy (DE)
Shana will inspire and empower you to advance the mission of your school

Katie Thiemann
Director of Leadership Giving
Cor Jesu Academy, St. Louis (MO)
Katie led a $10,000,000 capital campaign while simultaneously growing the school's Endowment from $1,900,000 to $8,400,000

Chris Stiles
Director of Advancement
Mount St. Mary High School (OK)
Chris has just completed a $6 million capital campaign.

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

Kelli Wilson
Director of Admissions
Guerin Catholic High School (IN)
Kelli is an energetic coach bringing expertise in marketing and communications as tools for increasing enrollment.

www.partnersinmission.com