



# St. Francis of Assisi

— CATHOLIC SCHOOL —

## *Development Office*

# 2010-2011 Annual Report

### Introduction

St. Francis of Assisi Parish's current, 5-year Pastoral Plan includes four primary goals for the school's Development Office:

- Define and strengthen the Development process;
- Expand donor support;
- Deliver the major Development events annually. Following, evaluate their effectiveness and identify opportunities for improvement;
- Implement new initiatives to build the Tuition Assistance Fund as well as a Planned Giving and Major Gifts program.

The work of the Development Office in the 2010-2011 fiscal year focused on those goals.

### Tuition Assistance Fund

The first annual Tuition Assistance Golf Outing, chaired by Ed Walsh, was held on September 21, 2010 at the Polo Fields Golf and Country Clubs in Ann Arbor. Nine foursomes played in the inaugural event; its purpose was to help build the Tuition Assistance Fund.



Tuition assistance is a necessity at St. Francis of Assisi Catholic School since it enables the continued enrollment of many students by keeping tuition affordable for a wide range of families. Our parish and school communities strive to help meet St. Francis families' needs for tuition assistance, which often arise unexpectedly during the school year.

In the past, a small portion of each family's regular tuition was used to help replenish the Tuition Assistance Fund. To minimize tuition increases, this funding mechanism was eliminated in 2009. To meet the need, the Development Office was charged with creating a new revenue stream for tuition assistance.

To help meet this challenge, the Development Office introduced the Tuition Assistance Golf Outing. The first annual event raised \$5,448 after expenses.

The Development Office also conducted two appeals for the Tuition Assistance Fund; one via mail in July 2010, and one in person at the conclusion of the 10th annual Educational Trust Fund Benefit on March 5, 2011.

In addition, throughout the year, friends of the school were given the opportunity to support the Tuition Assistance Fund via a remittance envelope in the quarterly Mustang Connection newsletter.

### Tuition Assistance Fund (net):

Golf Outing:	\$ 5,448
Summer Appeal:	\$ 8,411
ETF Benefit Appeal:	\$47,400
Newsletter Remittance Envelopes:	\$ 1,395
<b>Total:</b>	<b>\$62,654</b>

While this result may seem large, aggregate tuition assistance requests have typically exceeded \$70,000 in recent years. That said, the Development Office will continue to evaluate new, prospective initiatives to augment the Tuition Assistance Fund.

### Annual School Appeal

Each year, St. Francis of Assisi Catholic School makes a direct mail appeal to thousands of friends in the parish and school community for cash gifts through its Annual School Appeal. Its proceeds help support school operations, such as teacher salaries and curriculum necessities. Tuition does not fully cover the cost of educating each student at St. Francis of Assisi Catholic School; therefore, the success of the Appeal is critical since it helps bridge the gap between tuition charged and the school's actual educational costs. In the 2010-2011 school year the difference totaled \$2,003 per student.

Gifts to the Annual School Appeal are fully tax-deductible while tuition is not. So, it is an opportunity for means-based support to the school, particularly for enrolled families.

During the budget planning process each year, the Development Office establishes a target for the Annual School Appeal. In recent years, the target has exceeded the funds raised.

The 2010-2011 Annual School Appeal raised \$58,060 (before expenses of \$2,878) or 65% of its \$90,000 goal. In the spring of 2011, the Development Council (the volunteer support team to the Development Office) agreed in principle to conduct a review of the Annual School Appeal to consider ways it could possibly change to improve its overall outcomes.

In addition to the Annual School Appeal, many friends contribute to the school's operational costs via the Mustang Connection newsletter remittance envelope or when the time was best for them during the year. Those gifts were credited to "Other Development Income" to assist with ongoing operational costs.

Annual School Appeal / Other Development Income (net):

Annual School Appeal:	\$55,182
Other Development Income:	<u>\$ 2,942</u>
<b>Total:</b>	<b>\$58,124</b>

**Educational Trust Fund (ETF)**

The 10th annual Educational Trust Fund (ETF) Benefit, chaired by Mark and Jane Vogel and Sergio and Kristin Scarcella, took place on March 5, 2011. The event, which was held at the Four Points Sheraton in Ann Arbor, featured a Mardi Gras theme and included a sit-down dinner, dancing, charitable games, and a silent and live auction. Over 260 guests attended the Benefit, which raised \$50,423 in net proceeds for the Educational Trust Fund. That total included donations from sponsors, as well as friends unable to attend the event.



In the 2010-2011 school year, the Development Office launched an initiative to secure sponsors for the annual Benefit to help underwrite some of the costs. These generous sponsors participated:

- Active One Construction Company
- Associated Plumbing & Sewer Service
- Bank of Ann Arbor
- Jeff Crause at Edward Jones
- Print-Tech, Inc.
- Wiltec Technologies, Inc.

The Development Office also introduced the **ETF Leadership Circle** to ensure consistent growth of the Trust Fund over time. The program invited supporters to make a multi-year commitment to the Trust Fund of at least \$1,000 annually, for 5 years; twenty-seven families responded favorably in the first year.

Together they committed a total of \$190,000, and by the end of the fiscal year, the ETF realized \$32,000 from those pledges.

In addition to the ETF Benefit and the Leadership Circle, many friends contributed \$4,202 in new gifts to the Trust Fund. Several of them were donations in honor, or in memory of someone, and they ranged in amount from \$30 - \$1,000.

All of these efforts help build the ETF, whose primary purpose is to provide long-term financial assistance to St. Francis of Assisi Catholic School. The ETF pools gifts of money and invests the permanent fund to generate an income, which is then awarded to the school each year for operations. The most recent award (based on a formula set forth in the Trust documents) totaled \$53,000.

**Fiscal Year 2011 ETF Results**

New Gifts:	\$ 4,202
Leadership Circle Gifts:	\$32,000
ETF Benefit:	<u>\$50,423</u>
ETF Operating Expenses:	\$ (475)
<b>Total Net ETF Revenue:</b>	<b>\$86,150</b>
Investment Interest Earned:	\$ 27,518
Unrealized Market Gain:	<u>\$114,745</u>
<b>Net Investment Results:</b>	<b>\$142,263</b>
Award to St. Francis of Assisi School:	\$( 53,000)
ETF Beginning Balance, July 1, 2010:	\$1,121,296
Net Increase in ETF Assets:	<u>\$ 175,413</u>
<b>Ending Balance, ETF, 6/30/2011:</b>	<b>\$1,296,709</b>

**Car Raffle**

The 15th annual Car Raffle, sponsored by Gene Butman Ford and chaired by Patrice Deutschmann, incorporated changes suggested by a Focus Group which met in June 2010. The top prize offered the winner a 2-year lease on a 2012 Ford Focus with a \$6,000 cash alternative. Four additional cash prizes of \$1,000, \$750, \$500 and \$250 were also awarded.

Proceeds from the raffle totaled \$56,745 (before expenses of \$6,185) or 81% of the \$70,000 goal. The monies raised supported school operations which helped keep tuition affordable. Each year, the Car Raffle gives school families the opportunity to raise dollars from people who may have no other connection to the school, other than through the purchase of a raffle ticket. It also increases the school's visibility in the community.



Two goals of the 2011 Car Raffle were to reverse a trend of declining school family participation, and declining revenue. The percentage of tickets sold by the total of school families improved from a low of 63% in 2008 to 71% in 2011, and net revenue increased slightly as well.

Since its inception, the Car Raffle has raised \$1,050,866 in gross revenue. St. Francis of Assisi Catholic School is grateful to Ken Butman and Gene Butman Ford for their ongoing support.

<b>Total Net Car Raffle:</b>	<b>\$50,560</b>
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# Thank You Donors

## Development Office

July 1, 2010 - June 30, 2011

*St. Francis of Assisi Catholic School extends sincere appreciation to the donors listed below, as well as 21 unlisted, anonymous donors. Their financial support continues a strong tradition of generosity to help meet important school needs.*

*St. Francis of Assisi Catholic School is also grateful to the many unlisted individuals and businesses who contributed merchandise and services throughout the year.*

David & Kristen Ablauf	Kevin & Elizabeth Conway	H. N. Genova Development	Harry & Candia Laughlin	Edward & Linda Opaleski	Charles & Holly Stankovic
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Miriam Connolly	David & Karen Gamret	Steven & Diane Laten			



Please call the Development Office at 734.821.2208 with corrections.

**"For it is in giving that we receive."**

~ St. Francis of Assisi ~

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## Address Service Requested

### Planned Giving

In the 2010-2011 school year, the Educational Trust Fund (ETF) Board of Trustees embarked on a new initiative - Planned Giving. A planned gift is carefully considered by the donor in light of estate and financial plans, to be made at some future date, or at death. It can be funded through cash, equity, property, life insurance or a retirement plan, and made in any amount, for any purpose. It is a present decision to make a future gift.

A sub-committee of the ETF Board of Trustees started their work by writing a Case Statement; it addresses the question, *"Why St. Francis of Assisi Catholic School?"* The document makes the case that "Today, yes today, we must plan for the future." That publication is available from the Development Office. It is written with the Educational Trust Fund in mind, but planned gifts can be made to the school (and parish) too.

Six benefactors have notified the Development Office that they have made provisions for the Educational Trust Fund or the school in their estate plan. We are grateful for this extraordinary commitment.

*"Today, yes today, we must plan for the future."*

### 2010-2011 Development Council

Ed Walsh, Chairman  
Bob Conlin  
Doug DeFord  
Patrice Deutschmann  
Patti Dobbs  
Doris Filisko  
Glenn Gottfried  
Debra Hermann  
Betty Lemmer  
Fr. Jim McDougall, Pastor  
Eileen Peck  
Colleen Pierce, Director of Stewardship & Development  
Jane Vogel, Advisor

The volunteer Development Council works in partnership with the St. Francis of Assisi Catholic School Development Office to achieve the goals established in the 2009, 5-year Parish Pastoral Plan. The team meets monthly to plan and implement initiatives that will help strengthen the fiscal health of St. Francis of Assisi Catholic School.

You can help sustain our Catholic institution via your charitable giving. To make a donation or inquiry, contact the Development Office at [cpierce@stfrancisa2.org](mailto:cpierce@stfrancisa2.org) or at 734.821.2208.