



Sample Marketing Timeline Educational Endowment Trust

July

- Form educational endowment committee or subcommittee
- Contact Stewardship and Development Office to help with training of committee members (training scheduled for August)
- Start running bulletin announcements to educate parish about educational endowment

August

- Hold a training session for the new committee, committee begins to set goals and strategies
- Contact Stewardship and Development Office to schedule a fall planned giving seminar for October or November
- Continue bulletin announcements
- Be sure endowment information is on your parish/school website

September

- Insert backpack stuffers to educate parents on endowment
- Have committee begin working on identifying alumni, formulate database
- Start bulletin announcements for October seminar
- Go to Stewardship and Development website to download memorial card information and have cards printed for parish and local funeral homes

October

- Father talks from the pulpit about the upcoming planned giving seminar encouraging people to come
- Hold seminar, make sure everyone leaves with information about the educational endowment
- Do an article in your school newsletter about the endowment
- Start preparing for an end of the year mailing of the endowment brochure (download from stewardship and development website)

November - December

- Make a suggestion in your bulletin or newsletter for someone to make a gift to the endowment in honor of a family member or friend as a Christmas gift
- Send follow-up thank you cards to everyone that attended your October seminar

- Do an end of the year mailing asking for a gift for the endowment to school parents, alumni, grandparents, and people you have identified in your parish that have an affinity for Catholic education.

January

- Establish Prayer Buddies with the school children and the older generation in your parish (helps build relationships for the school)
- Continue bulletin announcements or inserts
- Start planning your Grandparent's Mass and Celebration for April
- Continue collecting alumni names

February

- Talk to your pastor, PTO and parish organizations to commit a portion of their upcoming fundraisers to the endowment. You will need your pastor to help lead this strategy
- Talk with Finance Committee about the having a part of the upcoming capital campaign go to the endowment

March

- Continue bulletin announcements
- Send invitation to all grandparents for upcoming Grandparent's Day

April

- Grandparent's Day – make sure they leave with information regarding the endowment, have an “endowment campaign balloon launch”, capture their mailing addresses to follow-up with a mailing
- Begin to review last year's goals and strategies to plan for new year

May - June

- Follow-up to Grandparent's Day
- Begin plans for alumni event/solicitation, parent campaign, parish wide endowment campaign, etc., etc.

