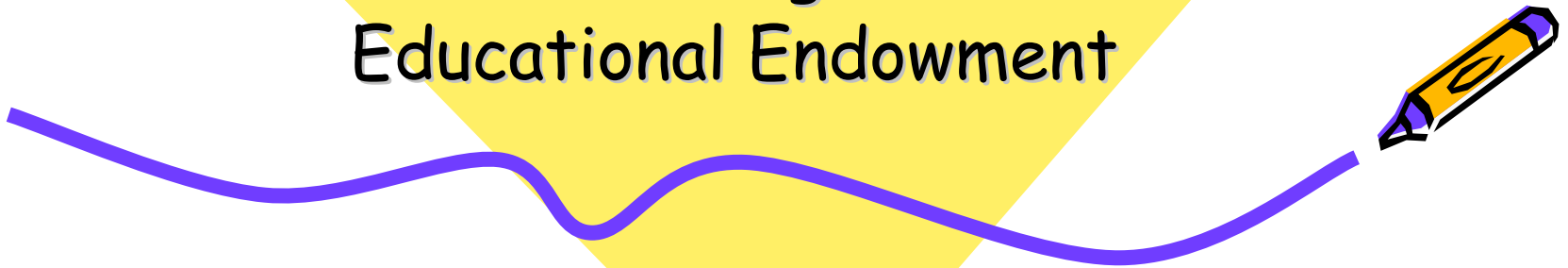




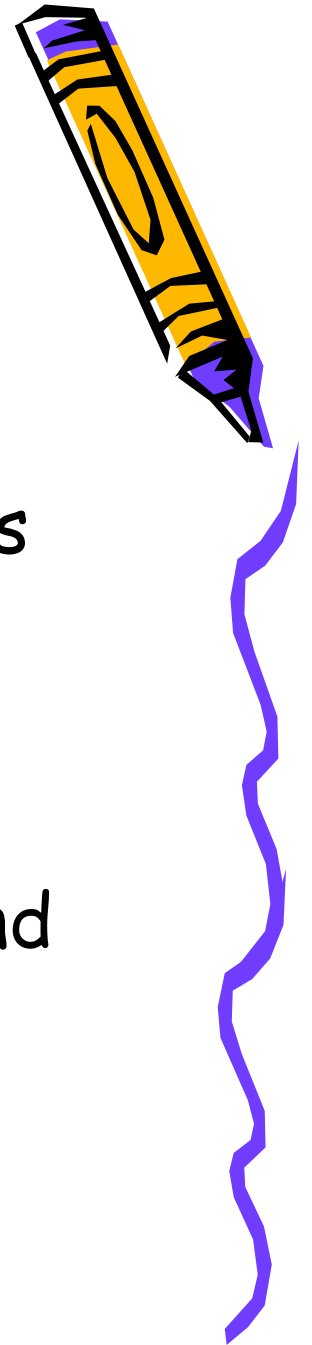
# How Much Wrapping Paper Does One Need?

Marketing Your  
Educational Endowment



# Presenters

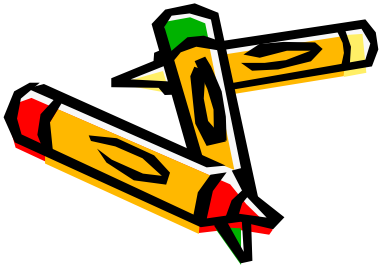
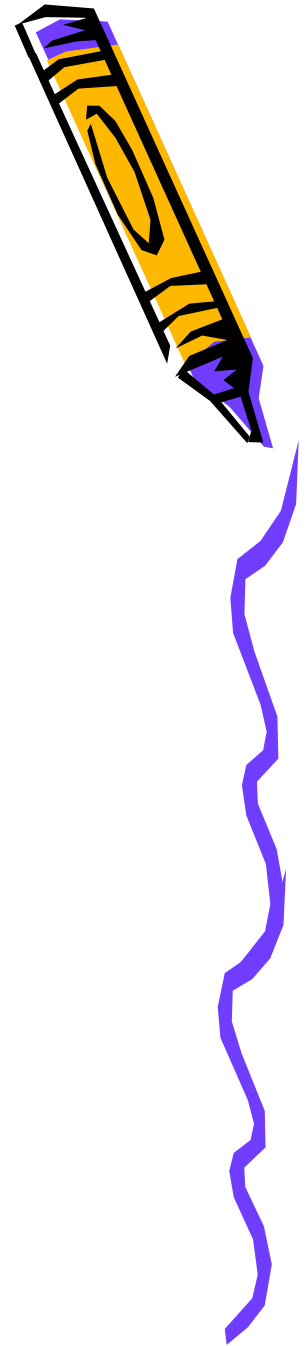
- Margo Shepard, CFP, CIMA  
Senior Vice-President - Investments  
Financial Consultant  
Smith, Barney
- Paula Moss, Director of Stewardship and  
Development  
Diocese of Kansas City - St. Joseph, Inc.



# History of Educational Endowment Trust

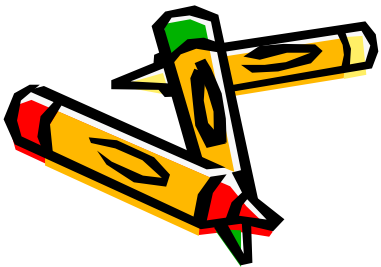
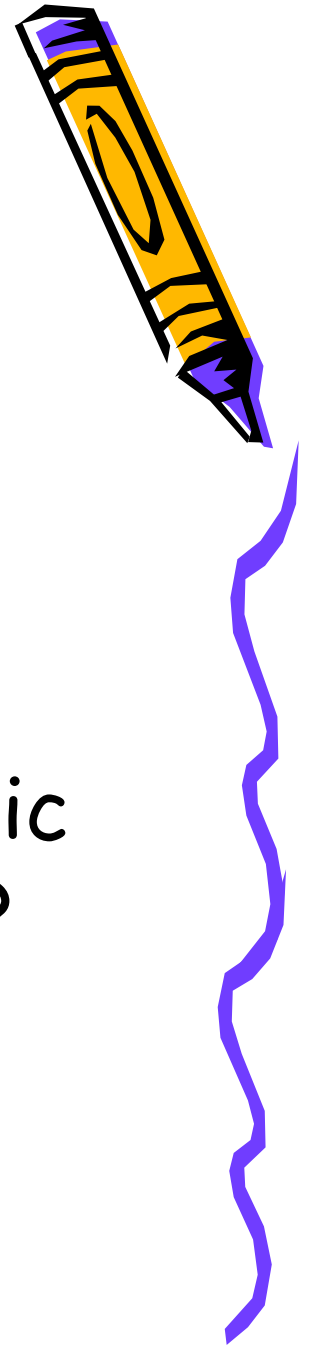
Archbishop O'Hara High School  
Bishop Hogan Memorial  
Bishop LeBlond High School  
Christ the King  
Co-Cathedral of St. Joseph  
Diocesan Ministry Formation  
Foundation for Inclusive Religious Education  
Holy Cross  
Holy Rosary ~ Kansas City  
Nativity of Blessed Virgin Mary  
Notre Dame de Sion  
Our Lady of Lourdes  
Our Lady of Peace  
Our Lady of the Presentation  
St. Ann ~ Independence  
St. Andrew the Apostle  
St. Anthony  
St. Bernadette  
St. Catherine ~ Clinton

St. Catherine ~ Clinton  
St. Charles Borromeo  
St. Elizabeth  
St. Francis Xavier ~ St. Joseph  
St. Gabriel Archangel  
St. Gregory Barbarigo  
St. James ~ Liberty  
St. James ~ St. Joseph  
St. John Francis Regis  
St. John LaLande  
St. Mary High School  
St. Mary ~ Montrose  
St. Mary ~ Nevada  
St. Patrick  
St. Patrick ~ Holden  
St. Patrick ~ St. Joseph  
St. Peter ~ Kansas City  
St. Pius X High School  
St. Rose of Lima  
St. Therese ~ Parkville  
St. Thomas More  
Visitation



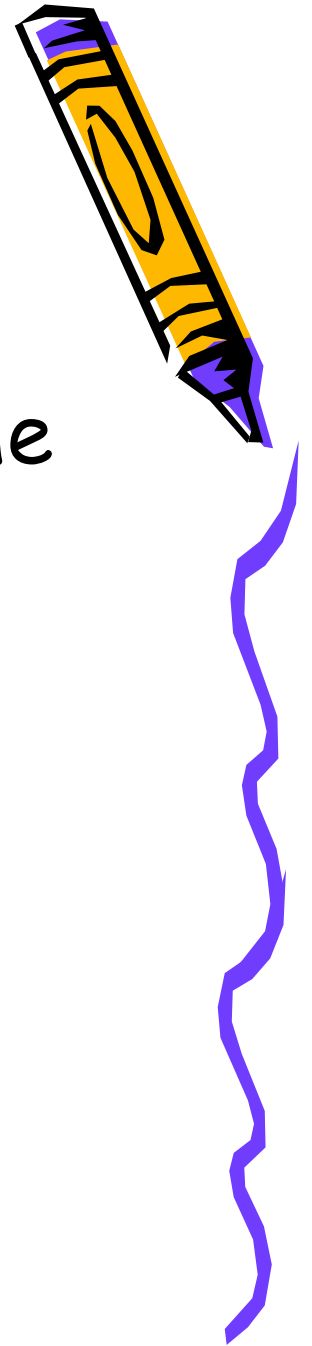
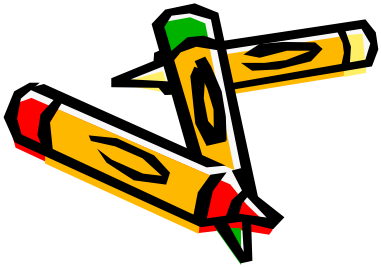
# Marketing Your Endowment

- What is an endowment?
- Why is it important to your Catholic school or parish school of religion?



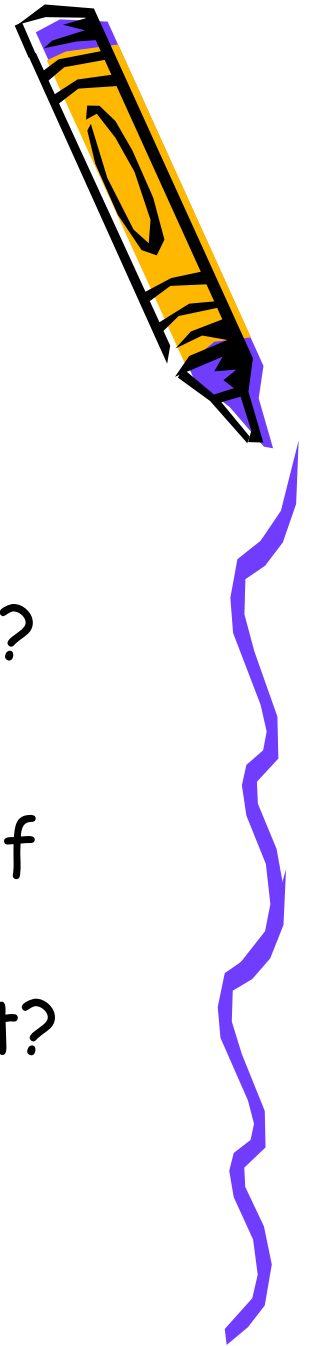
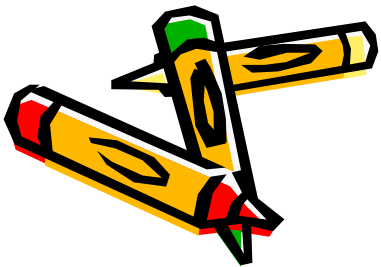
# Marketing Your Endowment

- How does the Diocese support the school endowments?
  - Educational Endowment Trust Board of Directors Review Investments
  - Professional Money Manager
  - Gift Tracking
  - Disbursements
  - Marketing
  - Website



# Marketing Your Endowment

- How have schools and parish schools of religion used their annual disbursement?
- What could your school, parish school of religion, or adult education program do with an annual endowment disbursement?



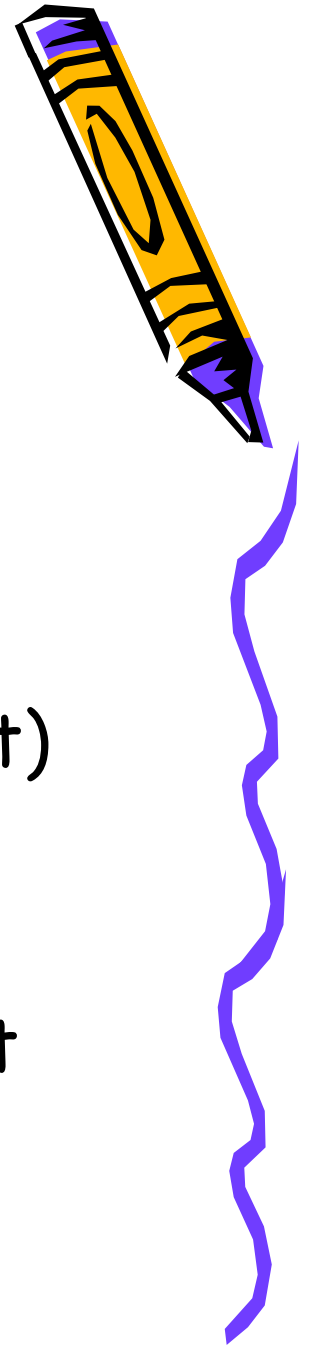
# Marketing Your Endowment

- Marketing Strategies/Tools
  - Educate parish/school about endowment with bulletin announcements, newsletter, backpack stuffers, website
  - Target Constituents with direct mail
    - Alumni                      Current Parents
    - Alumni Parents      Grandparents
    - Members of parish that received/value a Catholic education



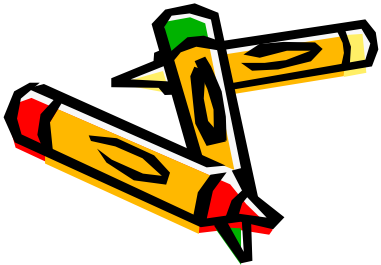
# Marketing Your Endowment

- Strategies Cont'd
  - Always include endowment in future capital campaigns (small or large amount)
  - When receiving undesignated planned gifts, commit half of gift to endowment



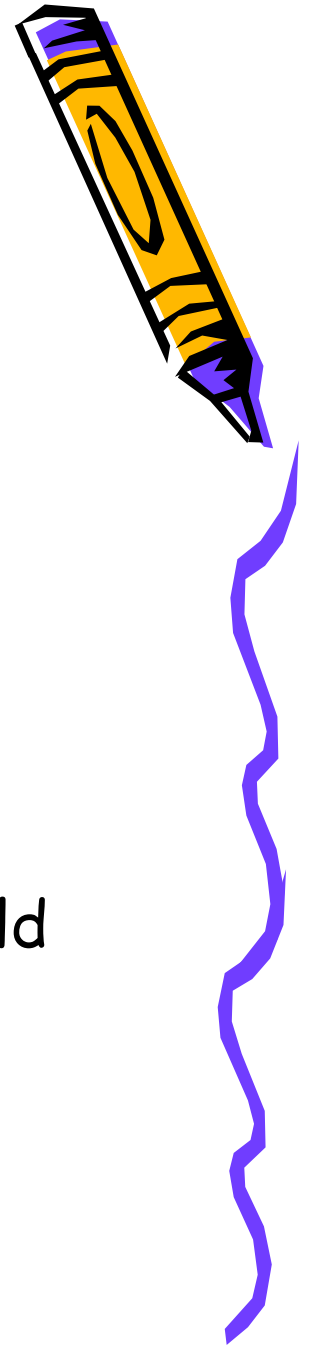
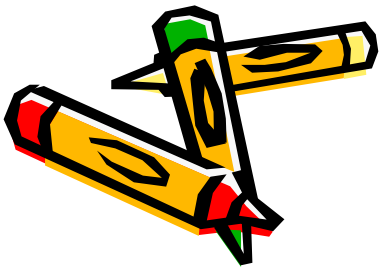
# Marketing Your Endowment

- Strategies Cont'd
  - Commit an amount from annual fundraisers (i.e. auction, gala, cookie dough sales, etc.)
  - Take advantage of Grandparent's Day/Mass by educating them and asking them for a gift or mail letter after event



# Marketing Your Endowment

- Strategies Cont'd
  - Alumni event to educate about endowment and follow-up with ask
  - Endowment campaign
  - Engage youth with older parishioners to build relationships (i.e. Prayer Partners, Reading Buddies)



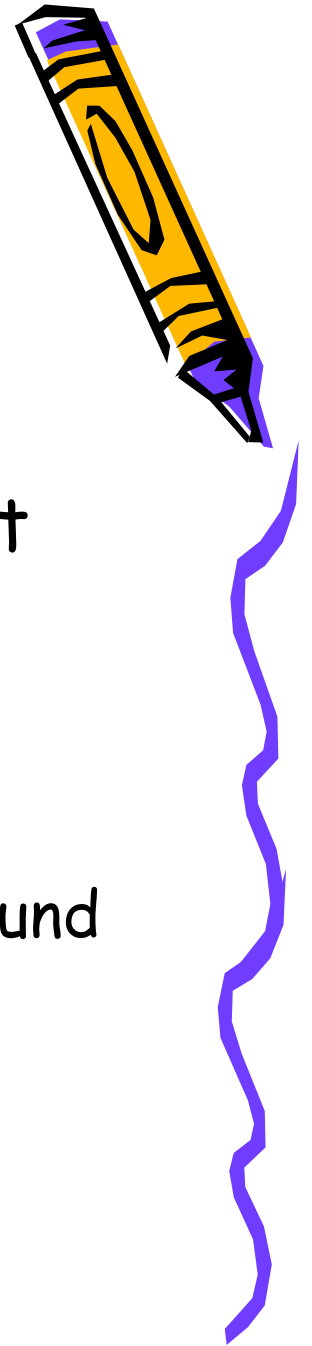
# Marketing Your Endowment

- Strategies Cont'd
  - Hold an estate planning workshop in parish and promote school endowment as beneficiary
  - Encourage memorial gifts/Honor gifts
  - Promote family scholarships



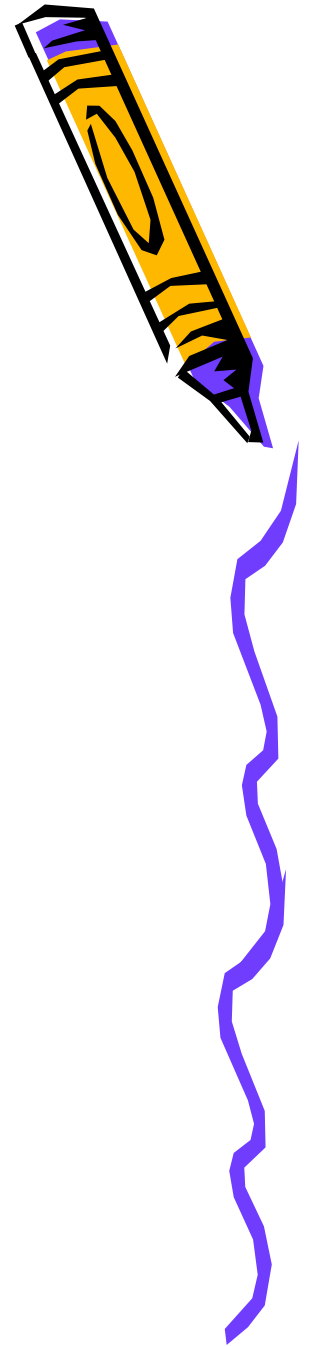
# Marketing Your Endowment

- You have to be **PERSISTANT** and **COMMITTED** to growing your endowment
  - On-going messages
  - Committed to annually putting money into fund from parish and school



# Marketing Your Endowment

- Where do we start?
  - Make sure pastor/principal is on board
  - Form an endowment committee or subcommittee
  - Educate your committee about endowments and how to market
  - Develop a marketing plan/timeline
  - Set short term and long term goals
  - Divide responsibilities among committee members
  - Get to work!



# Marketing Your Endowment

- What can the Stewardship and Development Office and the Office of Communications do to help you market your endowment?

