

For Catholic Schools: 10 Things Every Successful Development Officer Knows

Ready to take your fundraising efforts to new heights? Here are the top ten best practices and perspectives to embrace, as well as five deal-breaking mistakes to avoid (and what to do instead).



1. Grant seeking is not all about money.

If grant seeking isn't about money, what is it about?

The impact. The why.

You need to tell your story. Funders are going to be unimpressed (and they've heard it before) if you just talk about keeping the lights on, or the immediate use for the money. After all, they are not an electric company or an ATM.

Another common mistake is talking about how much your school needs the funds. Although there are some exceptions (such as your alumni list), most donors care more about the impact and mission of the school than they care about the school itself.

How does your school fill a gap? How does it meet a need that no other school in the area meets?

When you know how to tell your story—your *unique* story—and share your unique mission—funders will be moved to be a part of it. They'll understand their check is more than a check; it's an investment in your work and they will be able to visualize the impact.

If you're looking for a compelling way to tell your story, you can try creating a Message Map, which is a framework that can help you articulate what your organization does, how you do it, and why.

- **Step 1:** Establish your home base. This involves writing a statement that answers the question, what are we all about?
- **Step 2:** Branch off the home base with two to three proof points. These proof points should answer the question: in what ways are we accomplishing this claim?

- **Step 3:** For each proof point, branch off with two to three support data and other factors. These should answer the question, what evidence is there to show how we do that thing?

One aspect of this is very important: Approach foundations like a person, not a corporation. In addition to learning what is important to the foundation as a whole, ask what is important to the individuals you encounter at the foundation. Take time to build a relationship with them. This process takes time, but will establish a firm foundation for a long-lasting relationship that can lead to significant impact for your cause. At the end of the day, a person or a group of people will be making the final decision. The impact of relationship-building is vital for successful grant seeking.

Focus on fundraising not only as a practical and necessary endeavor, but also (and even more importantly) as a spiritual one: just like Henri Nouwen wrote about so eloquently. This will inspire the right funder to invest in your mission. You will be partners in the work.

"Asking people for money is giving them the opportunity to put their resources at the disposal of the Kingdom. To raise funds is to offer people the chance to invest what they have in the work of God. Whether they have much or little is not as important as the possibility of making their money available to God. When Jesus fed five thousand people with only five loaves of bread and two fish, he was showing us how God's love can multiply the effects of our generosity (see Matt. 14:13-21)."

Here are [12 common grant seeking myths](#) to be aware of (including "grant seeking is all about money").

2. Everyone at the school—including teachers, students, parents, and even the Board—should play an active role in fundraising.

It's important to get your entire school involved with fundraising in some capacity. Every member of your team should be an advocate for your mission.

When you empower every member of your team to be an advocate for your mission, you maximize the chances of finding funding since everyone will be equipped to tell your story.

A caveat: this doesn't literally mean that every single volunteer and staff member has to ask people for money. Fundraising is about more than just the dollars and cents. It's about sharing your story, sharing your impact, stewarding donors, and more.

The success or failure of this approach will largely depend on how your team perceives fundraising. For some it is a daunting task they would rather avoid. You can make a conscious effort to cultivate a new perception of fundraising. Invite your team to view fundraising as a way to further your mission, to invite donors as partners into your work for the Kingdom of God. Henri Nouwen's *Spirituality of Fundraising* offers an [excellent framework for shifting the perspective](#) about fundraising.

Set the expectation that everyone at the school will have some involvement with fundraising, whether it's thanking donors personally during school visits, sending hand-written letters or pictures from the students, or being trained to share the mission of the school with friends and family. It doesn't have to be much. A little effort goes a long way when the entire team is on the same page.

3. Don't neglect (or underestimate) the budget.

"A goal without a plan is just a wish" – Antoine de Saint-Exupéry

In any grant proposal or [case for support](#), the budget is crucial. It is a clear plan explaining how you will utilize funding to achieve your project's goals.

Carve out time to ensure you are covering all your bases. Don't be afraid to include operating costs as a real reflection of the anticipated costs. For example, if you are writing a grant for a program, and there is a teacher who oversees that as well as other programs, you may be able to build a proportion of their salary into the grant request. If they will spend 20% of their time on this specific program, you can include 20% of their salary in costs associated with the program.

Your school's overall budget will include fundraising goals. Your project will be a percentage of that goal, so make sure you understand how your project goal fits into the overall fundraising goal. Understand the priority level of your project in relation to other priorities, and be realistic about your project's timeline. Include milestones in the budget as well.

Be realistic as you set your budget. It might be tempting to create a budget that you think a funder wants to see vs. what is reasonable. However, creating an unrealistic budget sets you up for failure in the long run and can damage trust with funders.

To make sure your budget is realistic, consider all aspects of the project, even smaller elements that may not seem as important, such as mailings or office supplies. Have a colleague review the budget to make sure it is as comprehensive and accurate as possible.

4. Thank your donors often.

Gratitude naturally follows when someone makes an investment in your school. Expressing that gratitude to each donor in a personalized and genuine way helps them feel appreciated and glad that they gave. In the long run, this can positively impact donor retention and help prevent [donor fatigue](#).

Thanking donors once for their gift is a good place to start; however, expressing thanks ought to have a place in your overall strategy. This includes sending holiday cards, updating donors on the impact of their gift, offering prayers for their intentions, and hosting [donor appreciation events](#).

Sometimes funders will specify how often they want you to communicate with them—but many times, they don't. While your frequency for thanking them and sending updates depends on the size of the gift, their involvement level with your organization, and similar factors, it's absolutely fine to ask them up front how often they want to hear from you and if they have any preferences or expectations around how they are thanked. For example, some donors may wish to remain anonymous, whereas others might expect a plaque or newsletter callout. Some may wish to hear from you frequently; others may not. When in doubt, just ask.

If you haven't intentionally added donor appreciation into your overall strategy, you can start small and build from there. Add a special thank you message to your [email flow](#) or social media calendar. Include a personalized message or gift from your students, such as a hand-drawn picture, to your annual holiday card.

A donor event doesn't have to be a big to-do unless you want it to be. It can be as simple as a meet-and-greet with appetizers or a basket raffle. You could also simply host a tour

of your campus or a meeting with the individuals you serve. Showing donors the impact of their support can be especially impactful and effective.

5. Grant writing isn't a quick fix for budget problems, but it can be a game changer if done in the right way.

Grant writing is a long process that requires not only writing and communication skills, but also interpersonal skills as you work to build relationships with funders. It is never a “magic bullet” solution to funding problems, although it can solve some issues if you know how to approach it.

The first thing to remember: grants are not one-size-fits-all. You must follow each foundation's stipulations and respect their preferences. It can take many months or even years to see results, so it's natural to feel discouraged. Keep your eyes on the goal and understand that grants take time but can be very rewarding (for example, you may have the possibility of long-term or strategic partnerships that can be transformative to your organization).

If you are looking for a way to repair a problem with your building, or pay bills, grants are not likely to be a good fit. Few funders are interested in covering these kinds of expenses. Institutional funders are generally more interested in supporting the creation or growth of an impactful program that could change people's lives. Albeit, [operating costs](#) may be part of the overall budget (for example, buying supplies or food for an after-school program). This typically does not deter funders, since it is part of a larger initiative.

Grants are not a solution to shoring up operational deficiencies. One reason funders are not usually interested in supporting operating costs is that they generally want to know that the organization they invest in is financially sustainable. Their gift is an investment that they hope will make a significant impact, beyond just helping to run an organization on a functional level. If funders feel there is a chance that the organization will need to close its doors in the near future, or will need continued operating support with relatively little additional impact, they will be hesitant to give.

[Networking](#) is a sometimes overlooked key to successful grant seeking. Although it is efficacious to search for funders outside of your network, it can be an even better use of time to begin within your network. Talk to peers, talk to friends, see if you know any Board members with a foundation that may be a good fit for your mission—this can often be more fruitful than starting from scratch.

Once you do find funders, building relationships is key. Fundraising is not a one-time interaction, but rather part of an ongoing relationship.

As you work on [building relationships with funders](#), it's important to remember:

- You are inviting funders to be active participants in your school's mission.
- Funders are not dollar signs, they are people, which is why you should always approach a foundation as you would a person.
- Do thorough research to make sure you understand each funder and their interests, funding capacity, reasons for giving, etc. Funders will be more inclined to engage with you if there is significant alignment between your school and their organization.
- It's important to express gratitude and communicate with donors regularly. If you are not sure how much communication is too much, simply ask the funder how often they want to hear from you.
- Ask funders for feedback on your school, projects, etc. As partners in your mission, funders can offer a unique perspective and insights that may help you improve efficiencies and outreach.

6. Don't overlook the impact of planned giving and legacy gifts.

[Planned giving](#) isn't always the easiest topic to breach with donors. However, this is a crucial source of revenue for many Catholic schools, and it can be fulfilling to donors, as well, to leave a legacy of faith for a cause they deeply care about.

Become familiar with the different types of legacy gifts, including charitable gift annuities, donor advised funds, endowments, life insurance, retirement funds, real estate and assets, charitable trusts, and bequests. If your school has no planned giving program in place, you can start simply by prompting donors to list the school as a beneficiary of a policy or to include the school in their will. From there, you can expand on the program and on options for donors who would be interested in leaving a legacy gift for your school.

This approach can be particularly effective when presented to alumni or families of students who had a positive experience at the school.

7. Know how to ask for the right amount, every time.

Consider trying a direct mail appeal if your school hasn't done one before. If you have done an appeal in the past, consider enhancing your existing approach with best practices.

It's important to find the balance between asking aggressively and asking for too little.

The success (or failure) of an appeal depends largely on how the ask is presented—which includes the order of information, the tone, and the amount (or amounts) asked for.

Below are some best practices for direct mail appeals to help you determine how to ask for the right amount, every time, and maximize your chances of success. These were shared by Andrew Menke, Vice President of AskGenius, during an exclusive webinar for subscribers.

Create personas for your donors. You can look at data to do this, and create donor personas. Consider factors like:

- Has this donor given the same amount to the same appeal for the last 10 years?
- Have the donor's gifts increased progressively over time?
- Has the donor recently made a large gift or pledge to a specific campaign?

By identifying your donors' giving patterns, you can more easily customize the way in which you approach them.

Use the rule of 8:1. This means you should reach out eight times for every one appeal you send. This ensures your donors feel a strong connection with your organization and helps them feel valued for more than just their monetary contribution.

Don't spoil the magic of your appeal letter. When sending an appeal letter, don't ask for a specific gift amount in the letter itself. This breaks the spell of a heartfelt letter, unless the amount specifically is meaningful (for example, \$20 feeds a child, or \$100 grants access to a giving society). Instead, enclose a customized pledge card with recommended gift amounts.

Optimize your pledge cards. For major donors, you can send open-ended pledge cards. For everyone else, include ask amounts. Customize these as much as possible.

- Use ask strings (suggested gift amounts) on the pledge card. These should be ascending asks, which are proven to lead to gifts that are 17% higher than the average gift. (For example, your ask string might be \$50, \$100, \$250, \$500.)
- Don't ask for credit card info on the pledge card. Instead, include a website they can visit to make their gift.

Customize ask strings based on data. To customize the ask strings on your pledge cards, consider the following metrics:

- Amount given to that appeal last year
- Greatest gift ever to the appeal
- Greatest gift ever to the organization
- Lifetime giving amount
- Amount given to special events
- Amount given to annual appeal

- Amount given to any recent capital campaigns

All of these tips help to improve the donor experience of the appeal, leading to more positive outcomes for the organization and more positive feelings for the donor.

8. Diversify your revenue.

Catholic schools generally do not thrive on one or two sources of revenue alone. When you diversify your revenue sources, this helps to maximize your chance for long-term success. Additionally, this is often a positive sign for funders, who are generally more likely to support schools and other organizations that are financially healthy.

Some Catholic schools are entirely dependent on tuition. This can be harmful in the long run as enrollment may fluctuate. It's important to pursue alternate sources of income—grants, annual appeals, planned giving, corporate sponsorships, fundraising events, and more—in order to achieve financial stability. In addition, diversifying your school's revenue can open doors for scholarships and other ways to make high quality Catholic education more affordable for students and their families.

If you currently rely exclusively (or primarily) on tuition, examine other funding opportunities and evaluate which may be feasible for your school. Then, create a plan to get started.

9. Realistic fundraising and grant goals.

There are times when a highly ambitious fundraising goal is necessary. However, if a school regularly sets unrealistic funding goals, this is a recipe for discouragement and failure.

As you work on your fundraising budget, keep in mind that your ideal target may be larger than what can reasonably be achieved. For example, if you have some prospects on your list that you plan to connect with, but you have not yet begun the relationship, do not budget for the amount you will eventually ask for.

Before beginning a major fundraising campaign with an ambitious goal, it is advisable to complete a feasibility study or evaluate your school's capacity in some way. This will significantly increase the likelihood of success, and will help you plan for the best way to achieve your goal.

Similarly, when applying for a grant from a foundation, do your due diligence regarding the amount you are requesting. While you must consider your school's needs, it is also important to consider the foundation's prior giving patterns as well as any additional guidance provided by the funder. For example, it may not be worthwhile to pursue a funder who has no history of supporting Catholic education, even if it seems at first like your missions align.

Setting reasonable expectations and goals around fundraising and grant seeking builds your confidence (and your team's). It helps empower them as they ask for money, and this confidence inspires potential donors to give. When you are confident in your mission and your goal, your potential donors are, too.

10. Get comfortable with rejection. It's part of the job.

Nobody likes to be rejected, especially when you are asking for something that your Catholic school desperately needs. And sometimes it can be tough not to take rejection personally.

Rejection is a big part of fundraising. The more comfortable you can be with rejection, the less stress you'll experience when making an ask.

So here are some things you can do, emotionally and practically, that can help you mitigate rejection and address your negative feelings towards it:

- Be thorough in your research. Before getting in touch with a prospect, be confident that they are a good fit for your mission. Before making an ask, be confident you are asking for the right amount.
- Reflect on where your fear of rejection comes from so you can address the source on a psychological level. Once you understand why you fear rejection, you can look for ways to overcome that specific hesitation.
- Practice making asks beforehand with a friend or colleague. Have them reject you so that hearing the words with a prospect won't catch you off guard, and hearing a "yes" will be that much more gratifying.
- Remember rejection is not personal. It could be a lack of mission alignment, a budgeting issue, or conflicting priorities that are preventing a prospect from giving.
- Remind yourself that your worth as a person and even as a fundraising professional does not come from how many prospects you convert to donors. You are worth so much more than dollar amounts, successes, or failures.
- Encourage yourself and your team, especially when rejection happens. Remind yourself you did your best and take some time to regroup and relax before you make another ask.
- When you encounter a "no," interpret it as a "not right now" rather than a "not ever." Unless the prospect makes it clear that your school is not (and will never be) a good fit for their mission, keep the lines of communication open and continue to cultivate the relationship. You can even ask under what circumstances they would be willing to give, which will give you insight into their motivations

and will ensure you are prepared to make another ask at a better time.

It takes courage and resilience to fundraise. Even though rejection can be difficult, you can learn to be comfortable with the uncomfortable.

5 Mistakes to Avoid

When you have determined you are ready to start looking for grants, here are five important points to keep in mind:

1. Never underestimate the power of individual donors.

While grants from institutional funders are often a focal point in fundraising plans, the large majority of giving in the US comes from individual donors. In fact, in 2022 the amount given by individuals was over triple the amount given by foundations, for a total of \$319.04 billion! (*Source: [Indiana University Lilly Family School of Philanthropy](#)*)

As a result, ignoring or minimizing the role of individual donors, or overly focusing on grants, can limit your Catholic school's fundraising potential.

There are many ways of reaching out to individual donors, including major donor outreach, annual appeals, monthly giving programs, planned giving, and more.

Building a solid base of individual donors can also help you in your pursuit of grants, as this can signal to funders that you are making a meaningful impact and that you are financially stable.

Establishing a recurring or monthly giving program is a good way to move the needle on individual gifts, and to have a more reliable stream of fundraising revenue.

2. Don't forget to use data.

Why should donors give to your school?

You probably have a thoughtfully prepared list of reasons, the biggest of which is likely the impact you are making on the lives of your students.

How you communicate your impact can be the difference between a grant and a rejection. Of course, you'll want to tell powerful stories of the work you have done. This will move donors on an emotional level. However, stories alone won't move the most strategic donors on a practical level. This is where data comes in.

Use data to back up claims about your school's capabilities and to demonstrate irrefutable proof of your successful track record; use stories of impact to put those numbers into a tangible context. For example, a high school could provide the percentage of graduates who go on to attend college. A grade school with an after-school tutoring program could provide

the rate of grade improvements. Using data and stories together creates a compelling case for your organization and the work you are doing. It is tougher for donors to turn down an organization doing work they care about that fits with their mission and is proven to be effective when given the means.

3. Don't portray your Catholic school as unprofessional.

It's important to make a good first impression with everyone who encounters your school. From your physical space to your online presence, your school as a whole should convey a sense of professionalism so that donors will feel confident when they learn more about you.

Professionalism applies to:

- Print collateral such as flyers and brochures
- Your website, emails, and social media
- The demeanor of your staff and volunteers
- The cleanliness and friendliness of your physical building, including classrooms, meeting rooms, cafeteria, etc.

That's why it is important to:

- Keep your website up to date.
- Make it easy to give online or on a phone. This includes options such as text-to-give, emails that link seamlessly to your Give page, campaigns on social media, and Donate buttons in highly visible areas of your website. Think user friendly here. The easier it is to give, the more donations you'll receive.
- Use high quality photos and videos. This doesn't have to be expensive—you can use a Smartphone to capture great images or footage.
- Proofread all copy on your digital and print collateral to ensure it is error-free, clear, and concise.
- Put some effort into design, whether it's a brochure or a social media post. There are a variety of tools online that allow you to customize templates for a variety of purposes. Remember to use your brand colors and style when possible to keep communications consistent and recognizable.

Some Catholic schools have little to no budget allotted to communications or marketing. The good news is that you don't need to spend a lot of money on this. A little attention to detail and a little consideration of the user goes a long way.

4. Don't lose your focus.

Keep a central focus on what distinguishes you from other Catholic schools. This "unique value proposition" should

permeate all communications from your school, including your website, mailers, emails, and social media.

Your staff should understand and be able to articulate what makes your school unique as well. If you lose sight of this, it can become more difficult to convey your value to donors and convince them to partner in your mission. They may struggle to understand how your school is that much different from the private school up the street. When you can articulate how vital and unique your educational impact is, you can win more support as well as bolster your confidence in your mission.

From a donor's perspective, a school with a unique value proposition can be more appealing and easier to connect with on a personal level. For example, let's say a city has ten Catholic schools, but yours is the only one with a Jesuit tradition. Donors who have a connection to that tradition will be more likely to give to your school compared to the others.

5. Don't let your staff, students, and Board be involved in fundraising, networking, or donor stewardship without training.

Asking your staff to go out into the world and fundraise is unlikely to go well unless they are prepared. Incorporate uniform training for all new staff and volunteers, as well as interval training for refreshers and updates.

Not all staff and teachers will be highly involved in fundraising; they all have different roles. A basic level awareness should be included in all training, but for those who will be more involved in the fundraising process (Board members, upper management, and development staff), incorporate specific and ongoing training.

This could entail writing a sample script and practicing with a volunteer who will be soliciting prizes from community businesses for a raffle, meeting with Board members individually to discuss opportunities to connect with people from their network, or training upper management to ask for sponsorships from vendors they work with regularly.

Continuity is crucial here. When it comes to asks and telling your story, make sure everyone who is fundraising is on the same page. Your team should be telling the same story, highlighting the same statistics and milestones, etc.

Similarly, never go into an ask (or have one of your staff/volunteers do so) without practice.

This will provide a better experience both for the people being approached and the staff doing the fundraising. Your team may feel uncomfortable at first, but you can work with them and provide training to help them feel more prepared. This results in boosted confidence which helps potential donors feel excited about giving and supporting your mission.