



Catholic  
**DEVELOPMENT**  
SCHOOL

C U R R I C U L U M G U I D E

# Welcome to the new Catholic Development School!

We are pleased to announce the inaugural year of the Catholic Development School. This series of courses, offered during the academic year and throughout the summer, is designed to help you build a solid development program that will support your school now and in the future.

The courses are designed to be taken in sequence and thus may have other classes as prerequisites. For those with experience in the development profession, prerequisites can be waived through a personal interview. To arrange this advanced placement, please call Marita Hartshorn at 414-769-3451 or 800-769-9373 for an appointment.

## Courses at a Glance

ID #	Name	Instructor(s)	Weekday Date & Time	Weekend Date & Time
100	Articulating Mission & Vision	Pam Mueller	Oct. 2: 7 pm - 8:30 pm	
101	Parish & School Budgeting	Julie Pach	Nov. 12: 6:30 pm - 9 pm	Nov. 23: 8:30 am - 11:30 am
102	Needs Assessment Process	Pam Mueller & Joan Feiereisen	Oct. 9 & 15: 7 pm - 9 pm	
200	Leadership Structure	Michael Brauer	Dec. 3: 7 pm - 9 pm	
201	Rules of Board, Committee, Staff & Volunteers	Joan Feiereisen & Michael Brauer	Jan. 7 & 14: 7 pm - 9 pm	Jan. 11: 8:30 am - 11:30 am
202	Development Ethics	Mary Ann Vance & Bill O'Toole	Sept. 30: 7 pm - 9 pm Feb. 3: 7 pm - 9 pm	
300	Identification & Prospecting Strategies	Carol Bergmann	Feb. 18 & 25: 7 pm - 9 pm	March 8: 8:30 am - 11:30 am
301	Database Design & Management	Ellen Rohwer & Lisa Lesjak	April 7 & 28: 7 pm - 9 pm	
302	Donor Research	Patrick Jung	March 11 & 18: 7 pm - 9 pm	March 8: 12:30 pm - 3 pm
402	Major Gift Prospect Cultivation	Mary Ann Vance	Oct. 9: 7 pm - 9 pm	April 12: 8:30 am - 11:30 am
500	Role of Special Events & Fundraisers in Development	Marion Heinz	May 12: 7 pm - 9 pm	
501	Planning & Executing a School Auction	Holy Family School Auction Comm., Arch. Staff	Oct. 15, Nov. 12 & 19: 7 pm - 9 pm	
600	Elements of an Annual Fund	Marina Krecji	Jan. 7: 7 pm - 9 pm	
603	Personal Solicitation	Maureen Schuerman	Nov. 12 & 19 - 7 pm - 9 pm	April 12: 12:30 pm - 3:30 pm
800	Starting a Planned Giving Program	Mary Ellen Markowski	Nov. 14: 6:30 pm - 9 pm or May 8: 6:30 pm - 9 pm	
1002	Development in Changing Schools	Joan Feiereisen	TBA	May 10: 8:30 am - 10 am
1003	Development for Urban Schools	TBA & Joan Feiereisen		May 10: 10:30 am - Noon

### Mission

The Catholic Development School is dedicated to providing academically excellent, comprehensive development training within a values-based ethical context. The goal of our educational program is to develop professionals and volunteers dedicated to helping our Catholic schools and organizations secure the resources they need to be vibrant, effective organizations in the years to come.

### Philosophy

The Catholic Development School believes that development training builds from a base of knowledge that is sequential and inclusive. Our program assists staff and volunteers to assess needs of their schools and to identify prospective sources of support. The School then works with participants to develop their skills as leaders in the development process of cultivation and solicitation so they can secure annual and legacy support from individuals, corporations and foundations.

## Section One FOUNDATION COURSES

### NEEDS ASSESSMENT AND PLANNING SERIES

It may seem like the simplest question in the world. Why does the school need money? Yet there are often many conflicting answers: teacher salaries, capital needs, scholarships, tuition assistance, endowment, reduction in the parish subsidy. How can it be decided where the money raised in development programs should go first? The Needs Assessment and Planning Series help to determine where your school is, where it wants to go and what it will need to get there.

#### Course 100: Articulating Mission and Vision

What is the mission statement of your school? Can it be articulated by students, teachers, staff, and parents? Does your school have a vision statement that guides its activities? Has it been developed by all the stakeholders? This course helps you to evaluate and refine your statement by teaching processes you can use at your own schools. Also explored are ways to communicate and use your mission and vision statements in your development efforts and how they can guide your development planning.

**Instructor: Ms. Pamela Mueller**  
 Oct. 2, 2002 - 7 pm - 8:30 pm . . . . . \$25

#### Course 101: Parish and School Budgeting

There's more to development than raising money. Development dollars eventually will be spent. Examined in this course are the ideal ways to develop parish and school budgets, how to allocate development funds and to be accountable to donors. Also explored are honoring donor intent, setting up restricted accounts and endowments and developing "B" budgets.

**Instructor: Ms. Julie Pach**  
 Nov. 12, 2002 - 6:30 pm - 9 pm  
 ALSO OFFERED Nov. 23, 2002 - 8:30 am - 11:30 am . . \$25

#### Course 102: The Needs Assessment Process

Determining the needs of the school is essential to any development program. It's also critical that stakeholders have a voice in articulating those needs. Taught in this course is a needs assessment process that helps identify those needs in different areas, prioritizes them and involves members of all constituencies. The second session will include a simulation of the actual process.

**Instructors: Ms. Pamela Mueller & Ms. Joan Feiereisen**  
 Oct. 9 and Nov. 15, 2002 - 7 pm - 9 pm . . . . . \$40

### LEADERSHIP SERIES

The Leadership Series answers the question "Who will raise the money?" This coursework explores the roles and responsibilities of all those involved in the development process from paid staff to volunteers to the school secretary.

#### Course 200: Leadership Structure

Leadership — the involvement of staff and volunteers — is critical to the success of a development program. This class examines the ideal structure in both elementary and secondary Catholic schools for a development school. Included are discussions of volunteer recruitment and retention, committee formation, reporting structure and evaluation of the need for paid development staff.

**Instructor: Mr. Michael Brauer**  
 Dec. 3, 2002 - 7 pm - 9 pm. . . . . \$25

#### Course 201: Roles of Board, Committees, Staff and Volunteers

Roles and duties of each group and how they relate to each other are key elements of this course. Also covered are job descriptions for school staff and volunteers, evaluation and retention of development staff and communication between those groups. Special circumstances discussed are those of an employee who had been a volunteer and the role of the pastor in a parish school. Finally, professional organizations, networking, and mentoring programs will be explained.

**Instructor: Mr. Michael Brauer & Ms. Joan Feiereisen**  
 Jan. 7 and 14, 2003 - 7 pm - 9 pm  
 ALSO OFFERED - Jan. 11, 2003 - 8:30 am - 11:30 am . . \$40

#### Course 202: Development Ethics

Course includes examination and discussion of the Fundraiser's Code of Ethics. Specific topics discussed are solicitation situations, the sharing of information and staff and volunteer accountability.

**Instructor: Ms. Mary Ann Vance & Mr. Bill O'Toole**  
 Sept. 30, 2002 - 7 pm - 9 pm  
 ALSO OFFERED - Feb. 3, 2003 - 7 pm - 9 pm. . . . . \$25



## DONOR IDENTIFICATION AND MANAGEMENT SERIES

**Next question: Who will be asked to give the money?**  
This series helps schools to identify who their prospects are and to manage information about them in an organized and efficient manner.

### Course 300: Identification and Prospecting Strategies

"How-to's" covered include finding alumni, list gathering, recruiting class agents, establishing alumni societies and using special events. Other tactics examined are the purchasing of lists and the evaluation of foundation and business prospects.

**Instructor: Ms. Carol Bergmann**

Feb. 18 and 25, 2003 - 7 pm - 9 pm

ALSO OFFERED - March 8, 2003 - 8:30 am - 11:30 am . . . \$40

### Course 301: Database Design and Management

Presented are the recommended fundraising database products for Catholic schools, including their attributes and specific uses. Configuring software, day-to-day management and training are discussed. Course includes a hands-on component.

**Instructors: Ms. Ellen Rohwer & Ms. Lisa Lesjak**

April 7 and 28, 2003 - 7 pm - 9 pm . . . . . \$40

### Course 302: Donor Research

The key to a successful solicitation is often how much and what is known about a donor and his or her interests. Learn the techniques of donor research through public information, screening and rating techniques, on line sources and the purchasing of overlay information. Also discussed are the grade school-high school connection and confidentiality of information.

**Instructor: Mr. Patrick Jung**

March 8, 2003 - 12:30 pm - 3 pm

ALSO OFFERED - March 11 & 18, 2003 - 7 pm - 9 pm . . \$40

\*Experience determined through personal interview with one of the directors of the Catholic Development School



## Section Two TRANSITION COURSES

### DONOR RELATIONS SERIES

**Once you've identified what you need to raise money for, who is going to raise it and who you are going to ask, it's time to begin donor cultivation. The Donor Relations Series helps participants to identify ways to get donors excited about making an investment in the school and its future.**

#### Course 400: Donor Communication

This is a hands-on course devoted to preparing donor communications. Types of communication include alumni and friends newsletters, parish communications, parent communication vehicles, and annual reports.

**Prerequisites: Foundation courses or equivalent experience.\* Will be offered in the Summer Session.**

#### Course 401: Donor Cultivation Events

Thank-you dinners, benefactors' days, class reunions, all-school reunions and school tours are just some of the many ways donors can be brought into the school to celebrate its accomplishments and their generosity. Learn the effectiveness of each of these events and some tips for making each of them extra special.

**Prerequisites: Foundation courses or equivalent experience.\* Will be offered in the Summer Session.**

#### Course 402: Major Gift Prospect Cultivation

Major gifts are the lifeblood of annual funds as well as capital campaigns. Major donors require extra special attention and treatment. Discussed will be personalized strategies for cultivation, relationship building, uncovering donor "hot buttons," and forming an annual giving leadership society.

**Prerequisites: Foundation courses or equivalent experience.\* Instructor: Ms. Mary Ann Vance  
Oct. 9, 2002 - 7 pm - 9 pm . . . . . \$25**



## SPECIAL EVENTS AND FUNDRAISERS SERIES

Too often development programs consist entirely of special events. Although not the most effective way of raising money, special events can be worth the time, expense and volunteer effort put into them.

### Course 500: The Role of Special Events and Fundraisers in Development

This course identifies the integration of special fundraising events into the development program. Also examined are fundraisers, the traditional "retail store" efforts of schools. A hands-on fundraising audit is conducted at the end of the class.

**Prerequisites:** Foundation courses or equivalent experience.\*

**Instructors:** Ms. Marion Heinz

May 12, 2003 - 7 pm - 9 pm . . . . . \$25

### Course 501: Planning and Executing a School Auction

The school auction has become a lucrative tradition in many elementary and secondary schools. Learn how to maximize profits and ensure that your attendees come back year after year. Specific areas studied are gift solicitation, special gift items, set-up, check-out, cataloguing, themes, underwriting, and recognition.

**Instructors:** Holy Family School Auction Committee and Archdiocesan Staff

Oct. 15, Nov. 12 and Nov. 19, 2002 - 7 pm - 9 pm . . . \$50

## Section Three SOLICITATION COURSES

### ANNUAL GIVING SERIES

The annual fund is the lifeblood of an institution that has an effective development program. The annual fund is the solicitation of unrestricted operating dollars for the school. It is the easiest way to acquire new donors and then to move them up the development pyramid.

### Course 600: Elements of an Annual Fund

What makes an annual fund successful? Issues discussed include calendaring, the annual fund, overview of solicitation methods, integrating donor intent, budgeting components, annual reporting and giving societies. The relationship between school and parish finances is also explored.

**Prerequisites:** Foundation courses or equivalent experience.\*

**Instructor:** Ms. Marina Krecji

Jan. 7, 2003 - 7 pm - 9 pm . . . . . \$25

### Course 601: Direct Mail

Direct mail is the ideal way to acquire first time donors and to increase the giving of smaller donors. This course looks at effective letter writing, segmentation, testing, personalization, effective enclosures, pledge cards, scheduling and follow-up. Participants will create their own direct mail package in the second session, a hands-on workshop.

**Prerequisites:** Foundation courses or equivalent experience.\*

**Will be offered in the Summer Session.**

### Course 602: Telephone Solicitation

Although the telemarketing blitz has soured some organizations on telephone solicitations, this class will show how schools can effectively utilize students, parents, and alumni to secure annual fund gifts. Discussion includes preparation for a phone-a-thon, recruiting volunteers, finding phone facilities, phone-a-thon games and incentives and follow-up. Materials provided include sample phone scripts, pledge recording forms and answers to frequently asked questions.

**Prerequisites:** Foundation courses or equivalent experience.\*  
**Will be offered in the Summer Session.**

### Course 603: Personal Solicitation

Face-to-face solicitation remains the most effective way to secure major gifts. This course will walk participants through the major gift call including preparation, research, cultivation, getting the appointment, choosing the solicitor, the ask and the follow-up. Situational role-playing based on real life examples will be part of the second session of this course.

**Prerequisites:** Foundation courses or equivalent experience.\*

**Instructor:** Ms. Maureen Schuerman

Nov. 12 and Nov. 19, 2002 - 7 pm - 9 pm

**ALSO OFFERED - April 12, 2003 - 12:30 pm - 3:30 pm . . \$40**

## GRANTSMANSHIP SERIES

Although individuals provide by far the most philanthropic dollars to charities, foundations remain a viable source of grants. Unlike individuals, foundations have to give money away every year. The secret is matching your needs to the priorities of the foundations.

### Course 700: Research and Cultivation of Foundation Donors (Two Sessions —Second Session to be held at the Marquette Foundation Center)

Foundations should be treated just as individuals. Mass mailings of unsolicited proposals will lead only to frustration. Learn how to research foundations, make connections with program officers and board members, and analyze the foundations with the best fit for your school. Challenges for Catholic schools in the grants process will be examined. The second session will be an orientation to the resources available at the Marquette University Foundation Center.

**Prerequisites:** Foundation courses or equivalent experience.\*  
**Will be offered in the Summer Session.**

### Course 701: Writing the Grant

The first session will examine all parts of the grant writing process: determining the project and the amount requested, securing applications and guidelines, writing the letter of inquiry, following instructions and writing the actual narrative. Narrative pieces include the abstract, history of the school, target population, project narrative and budget, organization budget, outcomes and evaluation. The second session will be the writing of an actual grant project for your school.

**Prerequisites:** Foundation courses or equivalent experience.\*  
**Will be offered in the Summer Session.**

\*Experience determined through personal interview with one of the directors of the Catholic Development School

## PLANNED GIVING SERIES

**A good planned-giving program will help to secure the future of your school. Planned gifts are legacy gifts that are very often used to build endowments. These lasting investments from your most loyal donors may take a lone time to close, but will provide revenues to the school for many more years.**

### Course 800: Starting a Planned Giving Program

Learn how planned giving fits into the overall funding plan, the relationship of endowment and planned giving and how to form a planned giving committee. Also examined will be communication tools, prospect identification and cultivation, planned giving or heritage societies and the marketing of the program.

**Prerequisites:** Foundation courses or equivalent experience.\*

**Instructor:** Ms. Mary Ellen Markowski

**Nov. 14, 2002 - 6:30 pm - 9 pm**

**ALSO OFFERED - May 8, 2003 - 6:30 pm - 9 pm . . . \$40**

### Course 801: Planned Giving Vehicles

Bequests, charitable gift annuities, charitable remainder trusts, life insurance, and other planned giving vehicles will be explained and discussed. Learn how to match donors with the proper type of planned gift, link with financial planning experts and attorneys and how to process and document these types of gifts. Opportunities for schools with the Catholic Community Foundation will also be explored.

**Prerequisites:** Foundation courses or equivalent experience.\*

**Will be offered in the Summer Session.**

## CAMPAIGN SERIES

**If all of the building blocks of development are in place, the capital campaign will be extremely successful. Because the campaign utilizes all the skills and strategies of the building blocks that come before it, it requires much expertise and focus.**

### Course 900: Campaign Preparation

Campaigns often succeed or fail in the preparation phase. Learn the elements of campaign preparation including case development, prospect screening and rating, prospect interviewing, focus groups, building the donor pyramid, goal setting, leadership recruitment, materials development and kick-off planning and execution.

**Prerequisites:** Foundation courses or equivalent experience.\*

**Will be offered in the 2003-2004 Catholic Development School Curriculum.**

### Course 901: Major Gift Solicitation

Campaigns are built on major gifts. The vast majority of the total goal will come from a small number of donors. Course content includes choosing, assigning, and training, solicitors, making personal solicitations, utilizing the campaign materials, donor recognition, follow-up and the relationship to the annual fund. Integrating planned gifts into the ask is also discussed.

**Prerequisites:** Foundation courses or equivalent experience.\*

**Will be offered in the 2003-2004 Catholic Development School Curriculum.**

### Course 902: Campaign General Solicitation

Methods of securing gifts from the general constituency, including mail and phone, are a part of this course. Also discussed will be general donor recognition, the combined annual fund approach and class gifts.

**Prerequisites:** Foundation courses or equivalent experience.\*

**Will be offered in the 2003-2004 Catholic Development School Curriculum.**

## Section Four SPECIAL TOPICS IN CATHOLIC SCHOOL DEVELOPMENT

### SPECIAL ISSUES SERIES

These courses explore special issues in Catholic School Development. All are one session.

### Course 1000: Development Collaborations

It may sometimes be effective for Catholic schools to pool their resources and share development resources including staff. Learn the strategies that can make this approach succeed as well as the common pitfalls that can make it fail.

**Will be offered in the 2003-2004 Catholic Development School Curriculum.**

### Course 1001: Development in Merged Schools

Combined schools face a unique set of challenges in the development area. This course examines issues such as combining alumni lists, creating new publications, cultivation, and orientation to the new school, restricted giving, and the marketing of a new identity.

**Will be offered in the 2003-2004 Catholic Development School Curriculum.**

### Course 1002: Development in Changing Schools

Same school building, different population, different economic conditions. Have your school demographics changed drastically? Learn how to get the message across that Catholic education is still alive at your school. Explore techniques for involving alumni, dispelling rumors and making connections with new donors.

**Instructor:** Ms. Joan Feiereisen

**May 10, 2003 - 8:30 am - 10 am . . . . . \$25**

### Course 1003: Development for Urban Schools

Urban schools face unique challenges in development: dwindling or disenchanting alumni bases, few resources among current parents, and greater than average third source funding needs. Urban schools also have unique opportunities in securing funding outside of the "usual suspects." This course will explore grant opportunities, community and model project funding and competitive grant programs as well as the acquisition of non-alumni and parent donors.

**Instructors:** TBA & Ms. Joan Feiereisen

**May 10, 2003 - 10:30 am - Noon . . . . . \$25**

\*Experience determined through personal interview with one of the directors of the Catholic Development School

# About the faculty

## Co-directors:

**Joan Feiereisen**, co-director of the Catholic Development School began her development career 18 years ago when she joined a committee to reopen her alma mater, a high school in Milwaukee's central city that had been closed for financial reasons. She worked at the school, which was successfully resurrected, for nearly nine years, growing its annual fund from \$70,000 to over \$500,000. She also worked on the first capital campaign for the school that raised over \$5 million. After she left the school in 1993, Ms. Feiereisen managed capital campaigns for non-profit organizations throughout the country first as a consultant with a national resource development company and later with her own firm. In 1997 she was hired as the Archbishop's Delegate for Development for the Archdiocese of Milwaukee, a position she currently holds. Joan's department is responsible for an annual appeal of over \$7 million, a full service planned giving program and for providing consulting assistance to parishes and schools in the areas of annual funding, strategic planning, prospect development and capital campaigns. Joan has served on several boards of directors including Dominican High School, Holy Family Elementary School, Woodlands School, Leave a Legacy and First Stage Children's Theater. Joan is a graduate of Marquette University and is a member of Phi Beta Kappa and Alpha Sigma Nu, the national Jesuit Honor Society. She is married and the mother of two teenage children.

**Pam Mueller**, co-director of the Catholic Development School has been involved in the development profession for over 13 years. As Director of Parish Stewardship and School Development for the Archdiocese of Milwaukee, Pam is responsible for providing consultative resources to the over 200 parishes and 149 schools within Southeastern Wisconsin and acts as mentor to countless development directors and stewardship directors working in Archdiocesan parishes and schools. Her professional experience encompasses annual fund implementation, special event planning, leadership development, and capital campaign readiness assistance. For the last four years, she has organized the Catholic School Dinner, an event celebrating Catholic Schools in the Archdiocese of Milwaukee and has presented at various workshops and leadership conferences. Pam began her career in high school development and then brought her high school experience to the elementary school working as one of only five elementary school development programs in the early 90's. Pam is a graduate of Mount Mary College, is married and has five children. "I am so excited to be part of the Catholic Development School because it provides such a unique opportunity to mentor and encourage development professionals and volunteers to grow in their ministry of fund development."

## Faculty:

**Carol Bergmann**, Director of Development and Public Relations, Meta House has been involved with volunteer recruitment for 24 years. She has developed national networks of volunteers, using a number of different techniques to identify potential volunteers and donors. She believes the key to success is the "personal touch" and has assisted the Archdiocese with development classes for Catholic grade schools. She served six years (two years as chair) on the parish council at St. Monica Parish in Whitefish Bay, and six years (two years as president) on the Board of Directors of Rosalie Manor Community and Family Services. She is currently co-chair of the Human Concerns Committee at St. Monica Parish.

**Michael J. Brauer**, President of Stewardship Solutions, LLC, brings 17 years of experience to the Catholic Development School. Thirteen of those years have been working in and for Catholic schools and parishes. Mike began consulting four years ago and established his own consulting firm one year ago. Mike brings a briefcase full of "how to's" in the area of Board Development. He believes meaningful involvement is essential to maximize the potential of a Board member. A member of St. Robert Parish, Mike is married and has four children, all students at St. Robert.

**Marion R. Heinz**, CFRE, President of Marion Consulting Services, has 16 years in the profession of resource development. She has served as consultant to numerous non-profit organizations including Catholic schools and parishes, social service and health care providers, private schools and churches of various denominations. She brings experience in capital campaign planning and implementation, stewardship programs, board and volunteer development and training, feasibility studies, focus group facilitation, as well as resource development education and training.

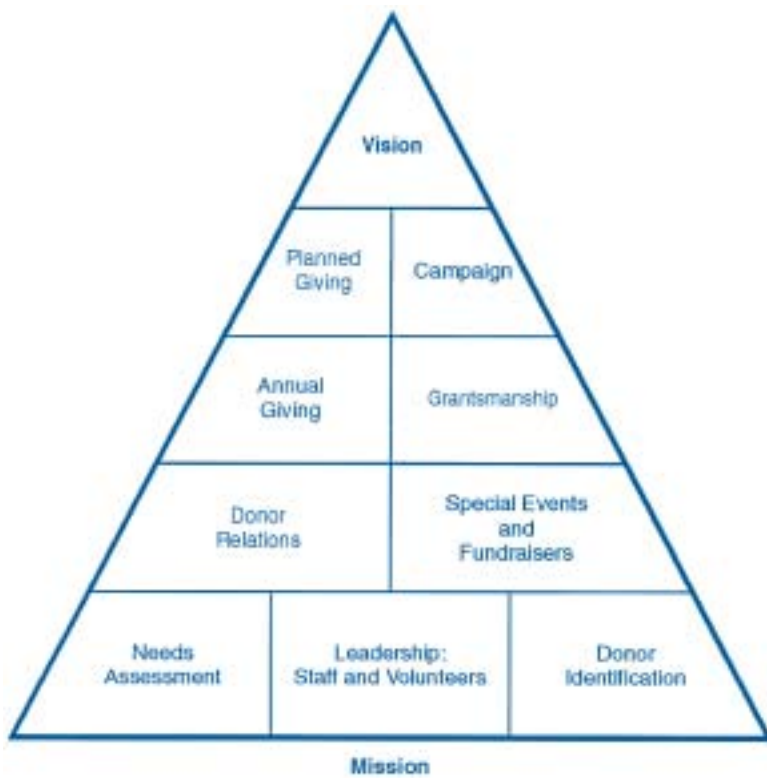
**Holy Family School Team**- Holy Family Parish School in Whitefish Bay started their auction eight years ago as a modest casino night. Today, their auction routinely attracts over 500 guests, features a silent and voice auction, raffles, dinner and dancing. The proceeds from the auction have done everything from supporting the school's operating budget to putting computers in every classroom and wiring the entire school for the Internet. Members of the auction team will share the secrets to their success, from soliciting auction gifts to decorations to checkout.

**Patrick Jung**, Development Administrator, Legal Aid Society of Milwaukee, received his B.A. in Political Science from the University of Wisconsin-Whitewater in 1986 and his Ph.D. in History from Marquette University in 1997. In addition to working as an adjunct history professor, from 1997-2000, he has worked full time in fundraising and development as a Development Researcher at Marquette University focusing on corporate and foundation research. From 2000 to 2002, he was the Director of Development for the Novus Group Catholic School Alliance, a collaborative group composed of nine Catholic schools on the southwest side of Milwaukee County. As Development Administrator, Patrick focuses upon proposal writing and individual giving programs.

**Marina S. Krecji**, Development Director at Milwaukee Repertory Theater brings over 10 years of development experience to the Catholic Development School. From 1995-1999, she worked as Development Director at St. Robert Grade School in Shorewood revamping an existing Annual Fund Campaign that resulted in nearly a 40% increase over 3 years. Marina was instrumental in the implementation of a new development data base, coordinated all school fund raising activities and developed new and creative solicitation and acknowledgement methods. Currently as Development Director for the Milwaukee Repertory Theater, Marina is responsible for raising approximately \$2.5 million dollars annually for theater programs and oversees a Board of Trustees of over 40 members.

**Lisa Lesjak**, Director of Development, Dominican High School, has worked in Catholic education for more than 15 years. Lisa began her career in development at St. Mary's Academy, then moved on to Marquette University. For the past 10 years, she has held the position of Development Director at Dominican High School in Whitefish Bay. A past president of the Catholic Schools Development Association, Lisa started in development at a time when paper record keeping was "all we had." She has learned to embrace technology and is a very hands-on administrator when it comes to database management. Her philosophy has always been, "Never forget that I manage the database, it doesn't manage me."

(Faculty information cont'd →)



## The Building Blocks of Development

Catholic Development School  
 Archdiocese of Milwaukee  
 3501 S. Lake Dr.  
 P.O. Box 07912  
 Milwaukee, WI  
 53207-0912

## About the faculty (cont.)

**Mary Ellen Markowski**, principal & owner of MEM & Associates, LLC, a consulting firm specializing in development and marketing for not for profit organizations, has been the Planned Giving consultant for the Archdiocese of Milwaukee from 1999 until 2002. Currently Mary Ellen is the interim president of the Catholic Community Foundation. Mary Ellen brings over ten years of development experience with institutions of higher education and other not for profit organizations with a special expertise in planned giving and has more than eleven years of trust administration experience. She holds a Bachelor of Science Degree from Marquette University, with a specialization in Finance and is a board member of the Planned Giving Council of Eastern Wisconsin, Marquette University M Club and Marquette University Blue and Gold Advisory Board. Mary Ellen is also the Co-chair of the Marquette University Putt for the Eagles Golf Outing and a member of the Marquette University Athletic Board.

**Julie Pach**, Associate Director of Parish Stewardship and School Development for the Archdiocese of Milwaukee has been involved in Stewardship and Development education for many years. She has facilitated development and recruitment assessments for elementary schools throughout Southeastern Wisconsin and presented development instruction to key school leadership groups and boards. Before coming to the Archdiocese, Julie served on the pastoral staff at Gesu Parish, a large Jesuit parish located in the central city of Milwaukee, for 14 years as Director of Administrative Services, where she was responsible for overseeing and directing the administration of the parish. Julie is also active in her parish and volunteers her time in her children's elementary and high schools.

**Ellen D. Rohwer**, Senior Manager, Nonprofit Services at Clifton Gunderson, has broad-based experience as a fund-raiser. She has been consulting in the field of technology and philanthropy operations since 1997, and has quickly built a national reputation for expertise in this fast-changing environment. Ellen combines her technology and planning knowledge with her experience in

fund-raising, accounting and non-profit management to serve clients around the nation. Ellen earned a Bachelors Degree from Marquette University, a Master's Degree from University of California at Santa Barbara, and certification from the Association of Healthcare Philanthropy and University of Wisconsin Madison School of Business in Capital Campaign Management.

**Maureen Schuerman**, President of Accelerated Fundraising Solutions, Inc., has 12 years experience helping nonprofits exceed their fundraising goals. She has had the privilege of working with a wide variety of Catholic educational institutions, social service ministries and parishes in Wisconsin including: Marquette University, St. Catherine's High School, the Franciscan Peacemakers, the Jesuit Partnership and the Sisters of St. Francis. Such opportunities allow Maureen and her staff to express their Catholic faith and their commitment to social justice in their professional lives.

**Bill O'Toole**, CFRE, is the Director of Development for the Sisters of the Divine Savior whose national headquarters are based in Milwaukee. Bill is a seasoned development veteran with over 20 years of experience raising funds for St. Joseph's High School in Kenosha, Sacred Heart School of Theology, and Allendale Association. He holds a Bachelors Degree from Marquette University and an MBA from Cardinal Stritch University. An active member of St. Mary's Parish in Kenosha, he is currently serving on the parish council and stewardship committee.

**MaryAnn Vance**, CFRE, is the Director of Major and Planned Giving for the Archdiocese of Milwaukee. Her years of professional experience with Catholic schools span every grade level, pre-school through college. "What a blessing it is to work as development professionals for Catholic education. Through our efforts, not only do we help young people acquire a faith-based education, but we also share in the donor's joy of making a difference in the life of a child."



# Yes, I would like to register for the Catholic Development School.

Name \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_

School Name (if applicable) \_\_\_\_\_

School Address \_\_\_\_\_

City/State/ZIP \_\_\_\_\_

Telephone (Day) \_\_\_\_\_ (Evening) \_\_\_\_\_

E-mail address \_\_\_\_\_

## Please sign me up for the classes I've checked below.

	ID #	Course Name	Instructor(s)	Weekday Date & Time	Weekend Date & Time	Fee
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<input type="radio"/>	402	Major Gift Prospect Cultivation	Mary Ann Vance		April 12: 8:30 am - 11:30 am	\$25
<input type="radio"/>	500	Role of Special Events & Fundraisers in Development	Marion Heinz	May 12: 7 pm - 9 pm		\$25
<input type="radio"/>	501	Planning & Executing a School Auction	Holy Family School Auction Comm., Arch. Staff	Oct. 15, Nov. 12 & 19: 7 pm - 9 pm		\$50
<input type="radio"/>	600	Elements of an Annual Fund	Marina Krecji	Jan. 7: 7 pm - 9 pm		\$25
<input type="radio"/>	603	Personal Solicitation	Maureen Schuerman	Nov. 12 & 19: 7 pm - 9 pm		\$40
<input type="radio"/>	603	Personal Solicitation	Maureen Schuerman		April 12: 12:30 pm - 3:30 pm	\$40
<input type="radio"/>	800	Starting a Planned Giving Program	Mary Ellen Markowski	Nov. 14: 6:30 pm - 9 pm		\$40
<input type="radio"/>	800	Starting a Planned Giving Program	Mary Ellen Markowski	May 8: 6:30 pm - 9 pm		\$40
<input type="radio"/>	1002	Development in Changing Schools	Joan Feiereisen		May 10: 8:30 am - 10 am	\$25
<input type="radio"/>	1003	Development for Urban Schools	TBA & Joan Feiereisen		May 10: 10:30 am - Noon	\$25
Add Registration Fee						\$20

Note: All courses are held at the Archbishop Cousins Catholic Center.

Total Fee Enclosed \$ \_\_\_\_\_

# Registration Information

Now is the time to breathe new life into your development programs. Simply choose one, two or ten courses. The more you choose, the better the price! Each class offers fresh and creative ways to enhance your development program.

## Tuition

- Single session courses - \$25
- Two-session courses - \$40
- Any five courses - \$150
- Any ten courses - \$250
- Special school discount:
  - Send up to two people to ten courses - \$400
  - Send up to two people to the entire course series - \$600

## Registration Deadlines

- 1st Term registration deadline is **Oct. 2, 2002**
- 2nd Term registration deadline is **Jan. 5, 2003**
  
- 1st term classes run from September-December, 2002
- 2nd term classes run from January-May, 2003

## Withdrawal and Refund Policy:

All withdrawals must be submitted two weeks prior to the start date of each course. A \$10 processing fee will be charged for all canceled classes.

## Course Cancellation Policy:

Full refunds are issued by check for any class cancelled due to inclement weather, insufficient registration or other circumstances. You will be notified promptly of any cancellation.

## Course Change Policy:

Substitution of classes may be made as space is available and must be received by the Catholic Development School one week prior to the start date of desired course. Schools may also send replacement attendees to those originally registered. Individuals being substituted must meet the prerequisites stated on the course outline. Substitutions are not allowed for schools utilizing the special full-course school discount.

**Registration Fee:** All participants must pay a \$20 registration fee. Those using the school discount must pay two registration fees and will receive two binders and sets of materials.

# Payment Information

Please mail this form with check enclosed to: Catholic Development School  
Department of Development  
Archdiocese of Milwaukee  
3501 S. Lake Drive  
P.O. Box 07912  
Milwaukee, WI 53207-0912