

PACE

**Parents For The Advancement
of Catholic Education**

Strategic Business Plan

November 9, 2013
Business Planning Document

Itemized list for the business plan:

1. **Executive Summary:**

As the Mission Statement below indicates, The Parents for the Advancement of Catholic Education Foundation (also further referred to as PACE) has been formed and is currently run by a dedicated group of volunteers (mostly parents at this time) to provide an additional revenue stream for St. Joseph School, Penfield, Monroe County, New York.

The revenue amount required each year varies in amount and is determined by a joint budgeting effort between St. Joseph Parish Finance Council and PACE. PACE receives no government support and relies exclusively on donations from our school families, parishioners, catholic school alumni, businesses and the greater community.

2. **Mission:**

The Mission of PACE is to provide long term financial stability to St. Joseph School in its efforts to educate students with an affordable, faith-based curriculum that instills the ideals of service and citizenship. Funds will be raised to assist in maintaining the facility and to continually improve upon the quality of catholic education at St. Joseph School.

3. **Program Description:**

PACE is a 501c3 Non Profit Foundation established to raise funds for St. Joseph School so as to continue to enable the school to provide an education of the highest quality to their students.

PACE meets once a month with the exception of July. PACE has an Executive Committee which consists of a President, Vice President, Secretary and Treasurer. It is also comprised of Committees as listed below.

Each Committee will have a separate yet connected focus to raise funds. In addition, recognizing gifts, first through immediate acknowledgment by card or letter, and subsequently through personalized notes, personal expressions of appreciation directly to donors, and published lists of contributors are included as a responsibility of each Committee.

PACE has established and officially registered with the State of New York Articles of Incorporation and Corporate Bylaws. Both the Articles of Incorporation as well as the Bylaws are reviewed, updated and amended annually.

COMMITTEES - Revenue Generating

- 1. Annual Appeal** – Rhonda Antinarella and Kelly Gawronski
The Annual Appeal Committee is an organized effort to secure gifts on an annual basis, either by mail, phone, on line or through personal solicitation from all of its constituents.
- 2. Walk of Gratitude Chair** – Jeff Clayton
The Student Letter Writing Campaign associated with Walk of Gratitude and all aspects of this event.
- 3. Database and Alumni Relations Chair** – Jay Giacobbi
The management of the PACE Donor Database falls under the responsibility of this Committee
- 4. Special Events Chairs: Open Chair Position**
Special Events consists of venues such as Golf Tournaments, Galas, Auctions and Dinner Dances. In addition to revenue, these events foster greater constituent involvement in terms of time, talent and financial resources. Special Events are designed specifically to build community, raise funds, celebrate the school's mission, and strategically cultivate prospects. One to two major events are planned per year.
- 5. Major Gifts – Open Chair Position**
The mission of this Committee is to secure targeted gifts for a particular purpose in the amount of \$10,000+ toward strategic objectives proposed by the Faculty, Staff and School Advisory Committee (SAC). Examples of these particular purposes would be technology upgrades and the addition of new literary programs. Furthermore, endeavors and subsequent disbursements are approved by the administration and endorsed by the Board on an annual basis. Any revenue raised in excess of what is required for a given project will be assigned back to PACE for future appropriation.
- 6. Planned On-going Giving** - Anmarie Rizzo
This committee will target corporate, individual and/or alumni sponsors for donation support spread out over a pre-determined period of time. An example of this would be a donation of \$25,000 with payments spread out over a term of five years.
- 7. Endowments (Estate Planning) – Todd Gunther**
This committee will be responsible for charitable gifts that are planned, usually with professional help, to optimize a donor's financial, tax and estate plans while helping to

secure the long-term financial strength of St. Joseph School. Additional “ways to give” are being evaluated.

8. Grant Writing – Open Chair Position

The Grant Writing Committee will be responsible for identifying, researching and applying for grants. It will require in-depth analysis and research in order to determine which foundations, government agencies or corporations would be suitable to approach the funding needs for St. Joseph School.

COMMITTEES – Non-Revenue Generating

1. Communications – Staci Autovino-Kemp

A strategic effort to communicate and promote all PACE events via internal and external modes. Examples of various endeavors would include magazine articles, social media and web-site updates, parish bulletin articles, radio, newsprint, flyers and any other mass media sources as appropriate and applicable.

2. Nominating Committee – Open Chair Position

The nominating committee shall make recommendations for members of the Board of Directors in accordance with PACE By Laws. This committee will be comprised of qualified and knowledgeable people representing the best interests of PACE and St. Joseph School. This committee will also work in conjunction with PGA’s Volunteer Coordinator to fill Open PACE Positions.

3. Constituent Relations / Advancement Operations - Open Chair Position

Track constituents and their involvement in PACE, SJS, St. Joseph Parish, Alumni and the greater community. This includes the following: fund-raising donations and participation, demographic research, membership directories, volunteering activity and communications with individuals and businesses through the community. Tools include technology to identify potential donors based on previous donations and participation.

In light of the growth of social networking, there may be some overlap between social/community driven tools and non-profit/membership tools. The Advancement Operations aspect connects and reconnects alumni through multifaceted meaningful experiences and works with donors to help them know and understand St. Joseph School’s unique qualities in catholic elementary education. Depending on a particular endeavor, the coordination and logistics of mailings and other sources pertaining to the delivery of publications may be a responsibility of this Committee as well.

4. PACE Volunteer Coordinator - Open Chair Position

Work in conjunction with PGA, SAC and St. Joseph Parish to continually maintain a stream of active volunteers ready, willing and able to assist with various committees and endeavors. Collect, maintain and regularly update information on families and individuals regarding talents that could be matched up with PACE needs.

5. PACE Database Administrator- Jay Giacobbi

Assemble a committee to find correct and updated Alumni information, as well as new Alumni information, to enter into database. Support Alumni Committee with mailing list for reunions. Manage the database, train and supervise users, generate reports (campaign summaries, mailing lists) to support PACE campaigns. Manage, improve, and streamline entry protocols and procedures for transactions

EXECUTIVE BOARD – Non-Revenue Generating

6. President – Andrea O’Neill

The President is the Chief Executive Officer for PACE and shall have general supervision and leadership of the affairs of PACE. It is the responsibility of the President to ensure that the Committee Chairs and PACE remain focused on the Mission, the establishment of early goals and the committee attainment of those goals.

The President is responsible for establishing the direction, focus and pace for the team, and to confirm that there is sufficient support for the various roles and responsibilities within the various Committees. The President is also the official primary contact person for PACE and holds the responsibility of keeping the School Advisory Committee (SAC) and St. Joseph Parish Council fully informed about the overall activities of PACE.

The President will also be responsible for ensuring that the individual Committees are continually striving to create plans and meet their goals. Additionally, the President is responsible for overseeing the purpose and content of all PACE endeavors, to ensure a positive image is consistently conveyed by both words and actions, which includes the representation and actions of PACE Members. In addition, the PACE Chair is assigned the liaison to SAC and must attend all SAC meetings.

7. Vice President – Open Chair Position

The Vice President shall, in the absence, incapacity or disability of the President, perform all the duties of the President. This includes working in conjunction with SAC and PGA to continually evaluate how the organizations work in unison with each other. The Vice President shall also perform such other duties as may be prescribed by the Executive Board as necessary.

9. Treasurer/Accountant - – Open Chair Position

The Treasurer will manage the overall finances, taking into consideration both St. Joseph School requirements as well as PACE operating budgetary needs. In conjunction with Davie Kaplan, P.C., this responsibility also includes ensuring that PACE is adhering to all proper GAP principles. The Treasurer will provide a reporting of the financial position to the entire Board of Directors on a monthly basis, and will assist in directing financial strategic direction for board activities and special events.

8. Secretary – Colleen Parent

The Secretary is responsible for creating and maintaining a record of the Official Minutes of the monthly meetings as well as current contact listings of all Board and Committee Members. In conjunction with recommendations from the entire Board of Directors and professional expertise, PACE By-Laws and Business Plan must be reviewed and updated annually. The Secretary is also required to produce upon demand PACE's Corporate Seal and sign documents as applicable. Additionally, the Secretary collaborates with the PACE President, Vice President and Treasurer on projects as applicable.

LIAISON POSITIONS

9. Parent Group Association (PGA) Liaison – Debbie McCue, PGA President

Main contact between PGA and PACE. The PGA Liaison will collaborate with PACE in an effort to raise awareness between the two groups, and to limit duplication of fundraising efforts. PGA will keep PACE advised of their social and fundraising events by attending regularly scheduled PACE Board Meetings, and likewise communicate PACE endeavors at monthly PGA meetings. As applicable, the PGA Volunteer Coordinator Chair will provide contact information of those that have either expressed an interest or shown the potential to assist PACE endeavors.

10. Knights of Columbus (K of C) Liaison – James Hopper, Chancellor

The K of C shall work in conjunction with St. Joseph Parish and School to maintain a collaborative relationship to help support and maintain combined involvement in advancing St. Joseph School. This includes fundraising, community outreach/service, community awareness/PR, parent and parishioner involvement, school volunteer opportunities, etc. K of C Liaison will attend PACE Regularly Scheduled Meetings.

Best Practices and Benchmarking research/information gathering sessions that were attended prior to incorporating PACE included:

- i. Partners in Mission – The Partners in Mission Network is comprised of professionals committed to the ministry of Catholic education.
- ii. Diocese of Rochester (DOR), the Superintendent of Catholic Schools, DOR CFO and Communications Director.
- iii. Seton Catholic Academy, Rochester, NY.
- iv. Jim Wheeland, past Director of Advancement for McQuaid Jesuit High School, Rochester, NY.
- v. Independent Private School Marketing and Strategy Consultant (an SJS Parent).

Organizational Goals

Year 1: 2010/2011

- A. Raise funds to meet requested \$75k amount from St. Joseph Finance Committee/SAC – Fulfilled.
- B. Establish an annual appeal program – Walk of Gratitude and Letter Writing Campaign was established however a traditional Annual Appeal endeavor must begin.
- C. Fill vacant position openings with qualified, motivated and dedicated people – in progress.
- D. Establish overall strategic planning for PACE and related committees – in progress.

Year 2: 2011/2012

- A. Raise funds to meet requested \$75k amount from St. Joseph Finance Committee/SAC - \$65k was transferred to St. Joseph Finance Committee on 6/27/12.

- B. Implement Annual Appeal and database management – Annual Appeal was implemented and a net profit realized. Database management continues to grow and evolve.
- C. Fill vacant Board and Committee Chair Positions with priority to
 - 1) Communications – Carla Mancuso
 - 2) Endowments - TBD
- D. Map out idea for future Director of Advancement - TBD

Year 3: 2012/2013

- A. Raise funds to meet requested \$75k amount from St. Joseph Finance Committee/SAC -\$65k was transferred to St. Joseph Finance Committee completed June 31, 2013
- B. See creation of other committees off of the ground

Year 4: 2013/2014

- A. Raise funds to meet requested \$75k from St. Joseph Finance Committee/SAC. Consider \$65K has been achievable.
- B. Fill vacant Board and Committee Chair Positions with priority to:
 - a. Treasurer/Accountant – Open
 - b. VP – open
 - c. Annual Appeal - open
 - d. ROC the Day/Drive for your Ford chair – open
 - e. Gala Team leader – open
 - f. Walk of Gratitude - open
 - g. Planned On-going Giving - open
 - h. Communications - open

11. Strategies to achieve these goals:

- a. See related committees

12. Three Year Revenue Stream

2010-2011 \$75,000 – Actual (comprised of 2 years of fund raising)
 2011-2012 \$65,000 – Actual
 2012-2013 \$65,000 - Actual

13. Applicable Attachments:

- a. Financial Spreadsheets and Information
- b. Time Lines
- c. Action Plans
- d. Appendixes