



## **ALL SCHOOLS WEBINAR:**

Crafting a Case Statement to Create Communication Strategies

# Points for Discussion

- |     |                            |   |
|-----|----------------------------|---|
| I.  | Welcome & Overview         | Lauren McCormack<br>Director of Advancement           |
| II. | Crafting a Casement        | Sean King<br>Senior Director<br>CCS                   |
| II. | Model School Case Study    | Diane Pisido<br>Immaculate Conception CA- Astoria     |
| IV. | Question & Answer          | All   |
| IV. | Looking Ahead & Next Steps | Maria Castrillon<br>School Development Representative |





# WHAT IS A CASE STATEMENT?

## A Well-Crafted Case Statement is:

- Visually appealing and captures the reader's attention
- A logical progression of ideas and full of facts
- Always positive and inspirational in tone
- Compelling, dramatic, and urgent in nature



# What is a Case Statement?

## A Case Statement is:

- The official story of a fundraising effort
- A logical argument for eliciting support for needs at the academy
- A sales tool – for recruitment, solicitation, and marketing
- An educational tool about the organization

## A Case Statement is not:

- A school brochure
- The existing mission statement, vision statement, or strategic plan
- A substitute for personal “witness” and personal asking



# Why Do You Need a Case Statement

- Donors want to know how they can make an impact
- Donors want to help solve your problems – sharing your needs is an important piece of this
- Donors want clarity on where their funds go and what they do
- Fundraising is competitive – an attractive document that showcases the unique value proposition will give you a competitive edge.

# What Can You Use to Help Put A Case Together?

Strategic Development Plan	Mission and Vision Statements	Conversations with Leaders – Past and Present
Annual Report	Financial Statements	Existing Marketing Brochures
Websites and Social Media	Background Statements	Grants Submitted





## WHAT IS IMPORTANT TO INCLUDE?

- Who we are – identity, founding, character, traditions of the Academy
  - What we do – mission of Catholic education, service to Brooklyn and Queens community, reason for being
  - Why we do it – mission and outcomes
  - How well we do it – achievements and milestones
  - What we see ahead – vision and/or forces of change/challenge
  - What we're faced with – the compelling reason or need to support the School
- What we're going to do about it – the plan to meet the needs or challenges
  - How we're going to do it – the remedy; what we'll do with the money
  - How we're going to get there – financing plan to meet the needs
  - What are the expected benefits – goals and desired objectives, position
  - How you can help – the invitation and reason why donors should care

# What Do The Model School Case Statements Show Us?

We must continue to ask ourselves: how can we best serve our students and our community? How can we improve to make Our Lady of the Blessed Sacrament Catholic Academy a nurturing center of learning and excellence?

## Accomplishments Since We Became an Academy in 2016

- New STEM Lab
- Upgraded Computer Lab
- Security Enhancements including cameras at each entrance
- LED Lighting Improvements in the Auditorium, Hallways, Cafeteria and Gym
- 1:1 assignment of iPads in Grades 4 through 8
- Automatic Faucets, Soap Dispensers and Towel Dispensers in every restroom
- Automatic Sanitizer Dispensers at every entrance and on every floor
- Air Filtration with MERV filters in every classroom
- In 2020, held a dedicated fundraiser to provide 60 students with financial aid

"These important investments will ensure the viability of the Academy for the next decade and beyond."

## Our Lady of The Blessed Sacrament Catholic Academy

### Approaching Our Next Decade of Learning

While holding on to everything that has made Our Lady of the Blessed Sacrament Catholic Academy so special, the school is poised to approach its 70th anniversary with a critical next step: an ambitious campaign to further improve its academic offerings, to improve the health & safety of its facility and to increase the financial aid opportunities for its students.

These important investments will ensure the viability of the Academy for the next decade and beyond.

## THE HOPE FUND

Our Lady of Hope Catholic Academy is approaching its seventh decade of providing Catholic education for the families of Middle Village and Maspeth. This is an occasion for us to celebrate our legacy of success while also planning for the future. In that spirit, we are happy to announce the creation of *The Hope Fund*! The fund is envisioned to provide crucial support for the advancement of our school and the assistance of our families. *The Hope Fund* will be under the direction of the Board of Trustees of Our Lady of Hope Catholic Academy. *The Hope Fund* has three components: Tuition Assistance, Emergency Relief, and Capital Improvements.

- Positive in tone
- Directed towards donors – not recruitment focused
- Forward looking
- Clear and concise
- Attractive in nature and have multiple uses
- Spell out the needs – often around scholarships, programs, emergency needs, and/or technology
- Invite donors to participate in meeting the needs and advancing Catholic Education



## *Conversation with:*

**DIANE PISIDO**

BOARD CHAIR

IMMACULATE CONCEPTION ASTORIA

MODEL SCHOOL PARTICIPANT



*Diane is a proud graduate of Immaculate Conception School, Mater Christi Diocesan High School (now St. John's Prep) and St. John's University (B. S. in Accounting). Diane also received a M.B.A. in Finance from New York University and is a Certified Public Accountant.*

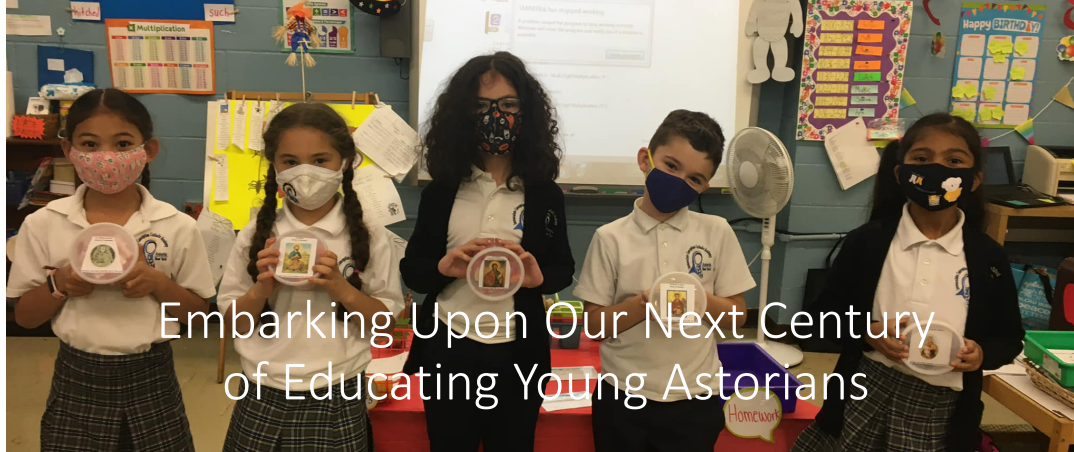


## Immaculate Conception Catholic Academy - Astoria



Where a lifelong passion for learning begins!





## Embarking Upon Our Next Century of Educating Young Astorians

The Immaculate Conception Catholic Academy – Astoria (“IMMAC”) has been the cornerstone of childhood memories for thousands of young people over the past 95 years!

As we approach our 100<sup>th</sup> anniversary in 2024, we need your help in preserving our legacy of educating the “whole” child – mind, heart and spirit.

Our Academy is truly a gem within the Astoria community, welcoming families of all faiths!

**If IMMAC made a difference in your life, now you can help make a difference in the life of a student!**

### ■ Rich History:

Immigrants’ Dreams and Strong Faith Serve as a Foundational Pillar of IMMAC

It started with a dream shared by a large population of new immigrants to the United States (Irish, German, Poles, Italians, Czechoslovakians) --- the development of a church and school. The dream was realized when our doors opened in 1924 and almost a century later, IMMAC remains a highly sought-after educational institution by families in our multi-generational and multi-ethnic Astoria community.

Shaping the lives of our young children for many generations with devout dedication was our beloved religious community – including teachers and principals such as the Sisters of the Holy Union of Fall River Massachusetts (at IMMAC for 56 years), parish pastors and priests, such as the Reverend Monsignor Fernando Ferrarese, (at IMMAC since 2008) and continuing the tradition, our new Principal, Brother Joseph Rocco, sc, Ed.D., a member of the Brothers of the Sacred Heart, one of only 3 religious principals in the Diocese of Brooklyn/Queens.

Faith-filled, the religious community educated hearts, souls, and minds, and gave their students a superb foundation from which to grow and serve others. They opened eyes and opened doors to opportunities these children may never have known.



## FAST FACT:

Educating students since 1924, Immaculate Conception School transitioned to an Academy in the Fall of 2017

Our Academy serves Nursery through 8th grade students of all faiths and reflects the rich diversity of our surrounding community

The Academy's mission is to provide every child with a safe and nurturing environment that facilitates a love of learning as well as a love for God, others, and self.

## ■ Imperative Mission:

Educating the Whole Child in a Challenging and Nurturing Environment

***IMMAC's mission is to provide every child with a safe and nurturing environment that facilitates a love of learning as well as a love for God, others and self.*** Our objective is to educate the “whole child”, by challenging them academically, deepening their faith in God and encouraging and supporting their personal growth.

Our IMMAC family of faculty and staff cultivates an environment where all students are challenged to reach their potential by celebrating their unique gifts and talents – while feeling safe and nurtured in a positive classroom environment.

Our Academy serves Nursery through 8<sup>th</sup> grade students of all faiths and reflects the rich diversity of our surrounding community.

## ■ Sustaining Vision:

Growing a Thriving Affordable Catholic Educational Institution

Our long-term goal is to promote, sustain and grow a primary education environment grounded in Catholic identity, where key stakeholders (including parents, teachers, administration, parish priests, the community, and alumni) partner to deliver support and encourage the academic, spiritual and personal growth of our students, preparing them for a successful transition to high school and life.

The Academy is blessed to be a part of the vibrant parish of the Immaculate Conception Church a diverse family united in our faith in Jesus Christ and reflective of Gospel values rooted in love, faith and prayer and committed to living the Gospel.



## FAST FACT:

Our Academy promotes intellectual curiosity, creativity, personal growth and faith. Rooted in a tradition of high standards in academics, athletics, and service to others, students are challenged to excel by our dedicated teachers and competitive curriculum.

**Early Childhood Programs:** We offer *Just the Two of Us*, a Toddler Program for children from 18 to 30 months and their parents/caregivers, a full or half-day Nursery program for 3-year olds and a full-day Pre-K for All program.

Classrooms are equipped with SmartBoards and students have access to I-Pads, Chrome Books and Google Classroom. Our new STEM Lab opened during 2018-19 school year.

## ■ Driving Objective:

Graduate Well-educated, Balanced and Happy Children

The sacrifices of many who make our Academy unique and special are rewarded by the success of our students:

- › Graduating self-fulfilled, balanced young adults best prepared to take on the challenges of high school and life
- › Transforming the student from early childhood to young adults with encouragement to respect self and others and be productive citizens and future leaders
- › Graduates who attend top high schools (and receive monetary academic scholarships)

## ■ Immediate Challenges:

Family Employment Displacements and Rising Operating Costs

Our immediate challenge we face is the need to support our families (current and prospective) who are faced with a variety of employment difficulties. During these uncertain times, many families are struggling financially, so obtaining the “whole” education of their child at a Catholic school is an aspirational dream.

1. **Family Challenges:** COVID-19 drove working parents to be furloughed and displaced permanently or for periods uncertain.
2. **Academy challenges:** Increases in operating budget due the unexpected expense of COVID-19 supplies/protocols to ensure our students, faculty and staff are in a safe and healthy environment along with the loss of essential *in-person* fund-raising events, limited due to COVID-19 restrictions.



## FAST FACT:

Higher Order Thinking Skills: In addition to meeting the challenges of the Common Core Learning Standards, teachers are dedicated to ensuring that students develop the higher order thinking skills needed to succeed in the 21st century.

We also offer Spanish, Music, Art, Physical Education, Regents Test Prep and Before and After-School programs.

Performing Arts Program: Our dynamic partnership with *Stages on the Sound* encourages creativity through theater and the arts for students in grades 4, 6, and 8. Students engage their imaginations, study the process of theatre and work together as an ensemble to put on their own innovative production

## ■ Solutions:

Raise funds to Supplement Tuition of Financially-Challenged Families

The IMMAC family is embarking upon an effort to substantially increase the funds available in our **Immaculate Mary Award Program (IMAP)**

**IMAP** is an endowment-like fund created for the exclusive objective of helping families who are unable to afford IMMAC's full tuition commitment.

Funded by the generous support of patrons such as yourselves - Alumni and Friends of IMMAC - **IMAP** extends financial awards to families who have recently been financially challenged to maintain their current tuition payments. The **Program** also provides support to families of potential new students who without an **Award** would not be able to consider attending IMMAC.

Award amounts are based on financial need as evidenced by tax documents, unemployment letters, and the in-person testimony of our families. Our Academy expects the families to contribute some amount to the stated tuition amount.

During these unprecedented times, more families need help, therefore we turn to our Alumni and Friends of IMMAC to open their hearts and welcome the opportunity to support this life-changing **Program**. All gift amounts are welcome! Gifts over \$10,000 may be made in recognition of a living or deceased loved one, e.g., **The Immaculate Mary – John and Rose Jones Award**.





## YOU CAN MAKE A DIFFERENCE

Make a dream  
become a  
reality for a  
child at  
IMMAC!

### ■ Your Role:

Consider a Gift to our Academy to Make a Difference in a Child's Life!

We remember with gratitude those early pioneers who had a dream for the future. We remember our religious sisters, and our lay teachers, and the great priests of our parish who guided us and did so much to shape us. How each of us has benefited from their vision, commitment and generosity!

The impact of our Academy on the lives of our young children is profound – if you are an alum, you'll certainly agree! In memory of and with gratitude for those early pioneers who realized their dream, let's celebrate and support the rich legacy and tradition that is IMMAC - truly a school like no other!

Please consider a gift to the **Immaculate Mary Award Program** and partner with us to ensure our legacy continues into the next century and help families realize their dream of a Catholic education.

- › Gifts to the General Fund – Visit our Website at [iccaastoria.org/Donate](https://iccaastoria.org/Donate)
- › PayPal, Credit Cards or Check all Welcome as Payment Options
- › Gifts in the name of a Loved One Living or Deceased – email [dpisido@iccaastoria.org](mailto:dpisido@iccaastoria.org)

# What Steps Can You Take To Get Started?

1. Identify who will be involved in the conversations – board chair, development committee chair, principal?
2. Convene the group for a meeting to work through core concepts
3. Identify top 3 needs and articulate the school's unique value proposition
4. Reach out to FIE for assistance

# Question & Answer

# Next Steps



# Important Next Steps

## Upcoming Webinar Dates:

- February 25: Planning for Spring and Summer Virtual & Non-Virtual Events
- March 25: Developing a Donor Stewardship and Acknowledgement Plan
- April 29: Donor Giving 101 (how to approach individual donors for support through cultivation and solicitation)
- May 27: Planning for the New School Year (pivoting the plan to date and getting ready for September)

*This presentation will be  
uploaded to the new Virtual  
Library being created at  
[www.catholicschoolsbq.com](http://www.catholicschoolsbq.com)*

We can help!  
Please reach out to [schoolsupport@  
futuresineducation.org](mailto:schoolsupport@futuresineducation.org)



# Futures in Education

FOR BROOKLYN AND QUEENS

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*Changing Lives Through The Gift Of Education*

