



**ROSARY
ACADEMY**

**ADVANCEMENT PLAN
2023-2024**



EXECUTIVE SUMMARY

Current & Historical Snapshot

In the fall of 2023, Rosary Academy will enter its 58th school year. The two largest campaigns Rosary (High School) ran was in 1993 at \$3 million to build the school’s gym and in 2012 at \$90,000 to add air conditioning in the gym.

In fall 2017, Rosary enrolled the smallest freshman class with the smallest total student body at 370. The school also received the highest request for financial assistance. With a new head of school appointed, the immediate need was to increase enrollment and fundraising to help bridge the gap. The head of school also launched into Rosary’s first-ever strategic planning process with Partners in Mission. The plan was official launched in January 2020.

Rosary received the largest planned gift of \$1.1 million in 2021, allowing the advancement department to exceed the fundraising goal of \$1.6 million.

In fall 2022, Rosary enrolled the largest freshman class in over a decade. The total student body for the 2022-2023 school year is 444. Rosary has offered over \$1.7 million in tuition assistance to current families making the total fundraising goal for the 2022-2023 \$2 million.

As Rosary begins year 3 of the strategic plan, the head of school with the approval of the Diocese of Orange and support from the Consultative School Board is launching a feasibility study in fall 2023 with plans to launch a capital campaign in spring 2024.

5-year Enrollment & Fundraising Comparison

	2023	2022	2021	2020	2019
Enrollment	463	443	460*	463*	389

*Years include Connelly transfers with a majority on significant financial assistance.

	2022-2023	2021-2022	2020-2021	2019-2020	2018-2019
Fundraising	\$1,813,962	\$2,595,255*	\$1,618,783	\$2,441,984 **	\$928,970

*Includes \$1.1M bequest

**Includes \$1.0M pledge divided over a 5-year period (FY20-FY24)

Revenue Targets

The following revenue targets have been based off of the budget set by the head of school, executive director of business operations, and finance committee, as well as approved by the Diocese of Orange. Current fundraising efforts are to support the projected deficit with the total fundraising goal including restricted and unrestricted donations.

A feasibility study will be launched in August 2023 followed by a capital campaign. Thus, the revenue targets are projected to change following the capital campaign.

	2022-2023	2023-2024	2024-2025
Annual Fund/Tuition Assistance	\$1,200,000	\$1,300,000	\$1,500,000
Restricted	\$800,000	\$900,000	800,000
Yearly Total	\$2,000,000	\$2,200,000	\$2,300,000

Fundraising	Goal (net)	023-2024 YTD	Goal vs YTD Actuals	2022-2023 Actuals	2022-2021 Actuals	Comments/Notes
Cracked Crab	\$ 110,000			\$ 109,230	\$ 102,200	
Red Wine & Gold	\$ 240,000			\$ 280,000	\$ 225,000	
Windsong Grant	\$ 125,000			\$ 125,000	\$ 100,000	
LeVecke Grant	\$ 1,000,000			\$ 200,000	\$ 200,000	\$200k paid out over 5 years
Bishop's Assistance	\$ 240,000			\$ 240,000	\$ 240,000	
TEL	\$ 50,000			\$ 50,000	\$ 50,000	
Kasler Grant	\$ 10,000			\$ -	\$ 10,000	*No students attending Rosary at this time
Helms Foundation	\$ 10,000			\$ 10,000	\$ 10,000	Reoccurring without ask
McDonald Family Foundation	\$ 80,000			\$ -	\$ -	pledge over 4 years
Shea Family Charities	\$ 250,000			\$ 250,000	\$ -	2nd installment of \$250 captured in FY23-24
Day of Giving	\$ 150,000			\$ 181,746	\$ 177,806	
The Rosary Fund	\$ 120,000			\$ 115,768	\$ 104,698	Donated outside of Day of Giving, includes unrestricted and tuition assistance
Athletics	\$ 50,000			\$ 32,529	\$ 16,183	22-21 no day of giving; 22-23 no golf tournament (\$25k)
Gift-in-kind	\$ -			\$ 15,000	\$ 28,650	
Script/Amazon	\$ -			\$ 356	\$ 667	Program is not promoted. AmazonSmile no longer available for FY23-24
Senior class gift	\$ 2,000			\$ 3,156	\$ -	Farmers & Merchant matched
Legacy Planned Giving	\$ -			\$ -	\$ 1,000,000	
Restricted Gifts	\$ -			\$ 362,000	\$ 238,577	
TOTAL	\$ 2,437,000	\$ -	\$ (2,437,000)	\$ 1,974,785		

Consultative School Board

As a diocesan high school, the consultative school board supports the mission of Rosary Academy and provides expertise and guidance in areas of financial growth and sustainability. The purpose of the consultative school board is to promote broader participation in the operational vitality of the school, serve on committees (advancement, facilities, and finance), and assist in formulating school policies. In partnership with the head of school, the executive director of advancement will encourage a spirit of philanthropy among the board, however, a “give and get” is not required for a position on a consulting board. The board will support school-wide efforts in developing a 5-year plan, financing, public relations, facilities, and fundraising efforts including, but not limited to: feedback on the advancement plan, messaging, sharing names of potential donors, alumnae relations, and helping launch the new planned giving program.

Ray Dunne

Principal, Emeritus

Santa Margarita Catholic High School
Board Chair

Dr. Shawna Pautsch

Head of School of Rosary Academy

Tara Campbell '11

Councilwoman, City of Yorba Linda
Chief of Staff, County of Orange

Rob Curry

CEO

Alamitos Management
Parent: '18, '22

Frank A DiCrisi III

Owner Batched Financial Services, LLC
Board Member, Laudato Si Action Platform &
Laudato Si Challenge
Parent: '22, '26; Servite '19

Jo Ann Eannareno, CSJ, MEd

Sisters of St. Joseph of Orange

Shannon O'Connell Hawkins

Principal
O'Connell Hotels & Hospitality Group
P: '20, '24

Scott A. Fishman, DDS

*Diplomate, American Board of Pediatric
Dentistry*

Owner, Pediatric Dental Arts
Parent: '18, '21, '23

Victoria L. Graf, PhD

Professor
Loyola Marymount University
School of Education

Rob Hoertz

Retired professional
40+ years in technology sales, business
development and consulting services
Parent: '99, '04

Richard S. Price II, JD

Attorney at Law
Parent: '18, '04

Vanessa Melgar Brundige '97

Senior Marketing Account Representative
Petro-Diamond, Incorporated

Steffanie Early

Vice President of Advancement
Servite High School
Parent: '21

Advancement Operations

With the support of the head of school, consultative school board, and finance committee, the advancement department at Rosary Academy grew in the 2021-2022 and 2022-2023 school years. The additional staffing was imperative as the fundraising goal continues to grow each year to help close the tuition gap.

The advancement team strives to provide the highest level of productivity in an environment that fosters honesty, integrity, professionalism, and trust. While advancing the mission of Rosary Academy, the advancement department focuses on relationship building internally and externally with enthusiasm to ensure Rosary is successful.

Staffing

As of September 2023, the advancement department consists of the following positions:

- Executive Director of Advancement – (7 years in this role)
- Alumnae & Annual Fund Manager - (5 months in this role)
- Special Events & Parent Programming Manager (2.8 years in this role)
- Hospitality Coordinator (8 years in this role)
- Marketing & Communications Manager (10 months in this role)
- Advancement Committee – volunteer role (on and off 4 years)
- Database consultant to support data clean-up and running reports – (5 months)
- Database Manager & Donor Relations – vacant

Goal: Provide professional development opportunities to each team member to continue excelling as a team and in each position.

Strategy: Set budget to allow for professional development

Tactics:

1. Research professional development opportunities
2. As a partner with Partners in Mission, register for free webinars

Goal: Review advancement efforts and create formal plans, policies, and procedures to enhance operations.

Strategy: Build on and/or create plans in the following areas: overall advancement plan, pre and post special event timelines, formal gift acceptance policy, naming rights policy, gift acknowledgement procedure, and marketing and communications

Tactics:

1. Reach out to board and committee members for resources
2. Review and update pre and post event plans
3. Research and write new naming policy
4. Conduct a data analysis for marketing and communications efforts to develop branding plan

Giving

I. Foundation Relations

Overview: The head of school and executive director of advancement have increased foundation relations and funding over the last 7 years. Many foundations give because of prior relations with leadership and/or board members. 3 grant requests for the 2022-2023 school year asked for increases and only one was received. In August 2023, received new grant of \$20,000 from McDonald Family Foundation.

Projected foundations supporting Rosary Academy for the 2023-2024 school year:

- Diocese of Orange Bishop's Assistance
- Windsong Trust
- LeVecke Family Foundation (need to reapply)
- Shea Family Charities (second half of classrooms accounted in FY23-24)
- Helm Foundation
- McDonald Family Foundation (new)
- Luberski Family Foundation
- Kasler Family Foundation (not received in FY2022-2023)

Goal: Increase grants received and/or amount from reoccurring grants.

Strategy: Submit 3 new proposals in 2023.

Tactics:

1. Create a foundation list
2. Ask board and committee members for introduction to
3. Ask board and committee members for feedback on proposals
4. Submit Letters of Intent (LOI) by due dates

II. Individual Giving

Overview: Individual giving continues to grow across all constituent groups, however, to keep up with the fundraising goal, a significant increase in donations and donors is necessary. The lowest constituent group giving is Rosary (High School) Academy alumnae. Additionally, data analysis is required to review donor retention over the last 3 years.

Goal: Triple the number of alumnae giving over the next 2 years.

Tactics:

1. With new alumnae relations manager to focus on alumnae, launch new opportunities for engagement
2. Conduct more intentional follow-up with alumnae after attending events
3. Develop list of 50 major gift prospects and actively engage the alumnae

4. Focus on storytelling when communicating with alumnae to share the need and why to give back to Rosary

III. Planned Giving

Overview: In 2022, Rosary Academy received the largest planned giving gift in the school's history. To ensure the school is sustainable for decades to come, efforts need to focus on the future of Rosary. After receiving the gift, the advancement team created a brochure and worked with OC Catholic to publish an article.

Goal: Secure 10 planned gifts in 2023.

Tactics:

1. Create more efficient form donors may complete
2. Develop list of prospects based on current donors
3. Schedule 3-5 prospect meetings each week

IV. Donor Stewardship

Overview: Rosary Academy strives to provide the school's benefactors with meaningful opportunities to engage with the school community and receive recognition for their generosity.

Goal: Make the donor experience personalized.

Strategy: Beyond the giving levels, provide regular communication to donors.

Tactics:

1. Create quarterly newsletter to illustrate their dollars at work
2. Formalize gift acknowledgement policy

Marketing & Communications

As the only all-girls Catholic school in Orange County, it is imperative that Rosary Academy share a compelling and motivating story to give back. Marketing and communications efforts need to consistently speak to the heart of why a donor chooses Rosary.

Goal: Produce videos that highlight students and young alumnae.

Strategy: Research students, draft scripts, invest in equipment to produce top notch videos

Tactics:

1. Set budget for videos
2. Draft communications timeline
3. Schedule filming with students
4. Produce videos

2023-2024 Proposed Advancement Calendar

July 2023

Launch feasibility study with Partners in Mission
3-5 Donor prospect meetings

August 2023

Annual Report
Donor Recognition (event)
Grant(s): LeVecke Family Foundation, Windsong Trust, McDonald Family Foundation
New Parent Dinner (event)
Cracked Crab sponsor/ticket ask (event)
3-5 Donor prospect meetings
Alumnae ask (email)

September 2023

Cracked Crab (event)
Thank you mailing (tax)
Reunion
3-5 Donor prospect meetings
Feasibility Study Interviews
Alumnae ask (email)
Cheer & Dance corporate ask(?)

October 2023

Thank you mailing (tax)
Grant(s): Kasler Foundation
Red Wine & Gold sponsor/ticket ask (event)
Parent ask for Christmas lunch
3-5 Donor prospect meetings
Alumnae ask (email)

November 2023

Thank you mailing (tax)
Thank you calls
Thank you postcard
Red Wine & Gold Underwriting (event)
Red Wine & Gold sponsor/ticket ask (event)
Red Wine & Gold donation drive

Parent ask for Christmas lunch
3-5 Donor prospect meetings
Alumnae ask (email)

December 2023

Thank you mailing (tax)
3-5 Donor prospect meetings
Parent ask for Christmas lunch
Red Wine & Gold sponsor/ticket ask (event)
Alumnae ask (email)

January 2024

Thank you mailing (tax)
Red Wine & Gold (event)
Senior class gift
St. Laurent scholarship solicitation (retirees)
3-5 Donor prospect meetings
Day of Giving Mailing
Alumnae ask (email)

February 2024

Thank you mailing (tax)
Day of Giving (ask & event)
Red & Gold opportunity drawing
3-5 Donor prospect meetings
Alumnae ask (email)

March 2024

Thank you mailing (tax)
Red & Gold alumnae lunch (event)
Red & Gold opportunity drawing
St. Joseph's Day Mass - 50+ class years (event)
3-5 Donor prospect meetings
Alumnae ask (email)

April 2024

Thank you mailing (tax)
Grandparents Day (event)
Athletics Day of Giving

Parent ask for Faculty/Staff appreciation
3-5 Donor prospect meetings
Alumnae ask (email)

May 2024

Thank you mailing (tax)
3-5 Donor prospect meetings
Alumnae ask (email)

June 2024

The Regium – school magazine with End of

Fiscal Year ask