



Advancement and Leadership
Services for Catholic Education

PRESENTS:

The National Leadership Conference for Catholic Schools™

THE ULTIMATE STRATEGIC RELATIONSHIP:

Board Members → President/Principal → Director of Advancement → Director of Admission

Hilton Naples, Naples, Florida

Sunday, March 1 to Tuesday, March 3, 2020

Half Day Workshops on Wednesday, March 4, 2020

THE NATIONAL LEADERSHIP CONFERENCE FOR CATHOLIC SCHOOLS, exclusively for Heads of School, Directors of Advancement, Directors of Admission and Board Members offering proven best practices in leadership and teamwork designed to inspire Catholic school leaders to transform their school communities.

NATIONALLY RECOGNIZED SPEAKERS will guide each participant seeking better understanding of their key action modes and personal strengths to enhance their leadership effectiveness.

IN DEPTH PRESENTATIONS will explore strategies and tactics proven successful in unlocking key individual relationship-building strengths — to motivate and empower your school community in advancing the mission of your Catholic institution. This conference is focused exclusively on the Catholic school President/Principal, Director of Advancement, Director of Admission and Board Members as the key strategic advancement relationship.

#PIMNaples

Register today!

The National Leadership Conference is planned for sunny southwest Florida and timed perfectly to coincide with your visits and receptions for alumni, parents of alumni, grandparents and friends in Florida.

**Strategic
Partners:**



ALUMNIFIRE



H&A | HABEED & ASSOCIATES
ARCHITECTS



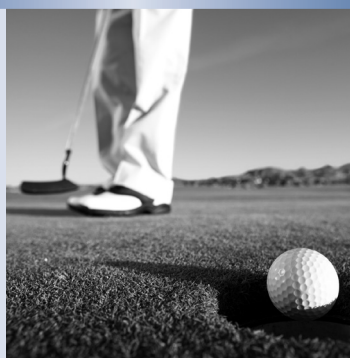
Partners in Mission

Advancement and Leadership
Services for Catholic Education



HILTON NAPLES HOTEL

Enjoy the perfect setting for this highly concentrated Conference — a relaxing environment conducive to discussion and reflection — the perfect complement to a full, dynamic Conference program. Attendees can expect to come away renewed, focused and inspired to begin a new chapter in their career and in their relationships.



Spend time with your prospects and donors who live or winter in Florida. Plan your reception today to leverage the time, place and energy of the National Leadership Conference to advance your School's mission.

The National Leadership Conference for Catholic Schools

*Explore and enhance the **Strategic Relationship** between Presidents/Principals, Director of Advancement, Director of Admission and Board Members.*

Hilton Naples Hotel, Naples, Florida — Sunday, March 1 to Tuesday, March 3, 2020



PROGRAM OVERVIEW

Every successful investor knows that lasting success for any organization or institution ultimately depends upon vibrant and dynamic leadership. Both research and experience show that successful Catholic school leadership invariably begins with an exceptionally high-quality relationship between the President/Principal and his or her Director of Advancement and/or Director of Admission — “the ultimate strategic relationship,” working together to advance the school’s mission of excellence in transforming young lives in and through Christ. This conference will help you develop “the ultimate strategic relationship” for advancing your mission and raising the resources you need.

PROGRAM BENEFITS

- Greater clarity in understanding your leadership strengths and specific, detailed practices to enhance your effectiveness in leading others to be effective leaders
- Confronting issues of school culture and challenges facing Catholic School Advancement with peers who share those same challenges
- Grasping valuable “lessons learned” from veteran Presidents, Principals, Advancement Directors, Admission Directors and Board members on building trust and developing strong working relations with each other and with their school constituencies
- Timely information and effective methods to enhance Board relations, school finance, advancement, and staff supervision
- Draft new action plans or enhance existing plans for twelve months of highly effective professional leadership development
- Compare notes and develop lasting connections with other Presidents, Principals, Directors of Advancement, Directors of Admission and Board members who share similar leadership and Advancement challenges

CONFERENCE GOALS

- Increased clarity and awareness of your personal strengths and unique abilities as a Catholic School leader
- Reassess, renew and recommit to those personal leadership strengths to the service of Jesus in the Catholic church and in your School
- Identify key strategic relationships in both the outside and inside School communities, prioritize them, and explore and discover proven methods to significantly improve the effectiveness and productivity of those key relationships
- Learn the most effective community-building best practices to use both inside and outside your School that will turn it into an attractive, and indeed, a compelling investment in excellence in Catholic education — carrying out the work of transforming young lives in and through Christ





CONFERENCE SCHEDULE

SUNDAY, MARCH 1

6:00 p.m.

Opening Liturgy

7:00 p.m.

Welcome Reception

MONDAY, MARCH 2

8:00 a.m.

Mass

9:00 a.m.

Opening General Session

*Speaker: Rev. Edward A. Malloy, C.S.C.,
President Emeritus University of Notre Dame*
**“Catholic Schools: Envision the Future or
Be Eclipsed By It”**

10:30 a.m.

General Session

The Advancement Team as Strategists

- Responding to Institutional Culture: Do You Change Culture or Does Culture Change You?

12:00 p.m.

Lunch Roundtables with the Partners in Mission
Team and our Strategic Partners

Annual Fund ... Major Gifts ... Boards ...
Capital Campaign ... Planned Giving ...
Enrollment Management

1:00 p.m.

General Session

The Advancement Team as Leaders

- Defining core institutional values; leadership as a catalyst for inspiration, motivation, nurturing and teaching

3:00 p.m.

Breakout Sessions

Panel Presentation and Discussion

Panel #1: School Presidents and Principals

Panel #2: Directors of Advancement

Panel #3: Directors of Admission

Panel #4: Board Members

**Winding Down... Winding Up
Cocktail Reception**

TUESDAY, MARCH 3

8:00 a.m.

Mass

9:00 a.m.

General Session

*Speaker: Grace Regan, Boston College High School,
President*

“The Role of the President in Advancement”

10:45 a.m.

General Session

The Advancement Team as Managers

- Lessons from the For Profit World: Managing for Peak Performance
- Making Relationships Work: Clarifying Expectations; Building a Partnership

12:00 p.m.

Lunch Roundtables with the Partners in Mission
Team and Our Strategic Partners

All Girl's Schools ... All Boy's Schools ...
Diocesan Schools ... Co Ed Schools ... Presidents

1:00 p.m.

Breakout Session

For Presidents and Principals:

Managing the Advancement Team

For Directors of Advancement and Directors

Admission:

How We Work Together to Advance our School's
Mission

For Board Members:

Building Strategic Board Composition and
Engagement for Tomorrow

2:00 p.m.

General Session

**The Advancement Team as Fund Raisers and
Team Players**

- Mega Gifts: Big Ideas Garner Big Contributions
- There is No “I” in TEAM: Building a Team from the Ground Up

3:00 p.m.

Winning Strategies to Take Home

SCHEDULE AT A GLANCE

SUNDAY, MARCH 1

Registration

4:00 p.m. to 6:00 p.m.

Opening Liturgy

6:00 p.m.

Welcome Reception

7:00 p.m.

MONDAY, MARCH 2

Mass

8:00 a.m.

Registration

8:30 a.m. to 9:00 a.m.

Opening Sessions

9:00 a.m. to 12 noon

Afternoon Sessions

1:00 p.m. to 5:00 p.m.

TUESDAY, MARCH 3

Mass

8:00 a.m.

Morning Sessions

9:00 a.m. to 12 noon

Afternoon Sessions

1:00 p.m. to 3:30 p.m.

CONFERENCE HIGHLIGHTS

Outdoor Welcome Reception
on Sunday evening

Winding Down ... Winding Up
Cocktail Reception on Monday
evening

WHY SHOULD YOU ATTEND

100% focus on Catholic
schools and Catholic school
leadership

A comprehensive resource
manual filled with useful
information and sample
documents for each participant

Dynamic presentations by the
Partners in Mission Team

Free follow-up consultation

Opportunity to visit your
alumni, grandparents and
friends who live or winter in
Florida

WHO SHOULD ATTEND

- Heads of Schools
- Presidents and Principals
- Directors of Advancement
- Directors of Admission
- Board Members
- Superintendents
- Religious Community Leaders



Wednesday, March 4, 2020

HILTON NAPLES HOTEL, NAPLES, FLORIDA

Following The National
Leadership Conference
8:30 a.m. to 12 noon

One Day Workshops

Sessions run simultaneously, choose one.

ONE DAY WORKSHOP FEE

Early Bird Registration Rate of \$129
(Expires December 31)

Regular Registration Rate of \$149
(January 1 to 31)

Late Registration Rate of \$169
(February 1 and after)

WORKSHOP 1

Capital Campaigns in Challenging Times and Making the Ask

Strategic Planning, What You Need to Know to be Successful, Ready the School, Campaign Budgeting, Staffing and Structure, The Role of Staff and Volunteers, Soliciting Major Gifts, and Electronic Wealth Screening. In addition, this workshop will focus on Role Playing, the Face-to-Face Ask, and Strategizing Individual Situations for Cultivation and Solicitation

WORKSHOP 2

One Day Giving Campaigns

Catholic secondary and elementary schools across the country have caught on to the giving day craze like never before... and for good reason. These powerful fundraising marathons – usually 24 hours long – have become a fun way to rally alumni and donors for quick, yet impressive, results. Join us and find out how you can grow your annual fund in one day!

WORKSHOP 3

The Fundamentals of Annual Funds

Building a \$1,000 Leadership Giving Program, Segmentation Strategies, Making Leadership Gift Calls, Effectively Utilizing Volunteers in the Annual Fund and Phonathons

WORKSHOP 4

Planned Giving Programs

Using Planned Gifts to Build Endowment, How to Build a Bequest Program, Identifying Your Best Planned Giving Prospects

WORKSHOP 5

Boards and Board Development

Identifying, Recruiting and Managing Your Board, and Unlocking your Board's Philanthropic Potential

WORKSHOP 6

Enrollment Management

Branding and Marketing, Strategies to Maximize Enrollment, Recruitment and Retention, and Best Practices for Tuition Management

WORKSHOP 7

Communications/Social Networking/Websites

Brand Management, The Integrated Website Solution, Facebook, Social Media: Going Online to Connect Your Alumni and More

SUMMARY OF SERVICES

Partners in Mission is a full-service development consulting firm specializing in Catholic school advancement. We partner with the clients we serve in advancing the mission of their organization by providing comprehensive solutions to the varying challenges they face. Specializing in capital campaign management, annual fund segmentation, major gift solicitation, strategic planning, volunteer leadership and enrollment management, among other advancement related services, Partners in Mission offers proven development strategies focused on mission and relationships. As a team, we value, understand and embrace the mission of Catholic education in our personal and professional lives and remain committed to ensuring its vitality and legacy for many years to come.

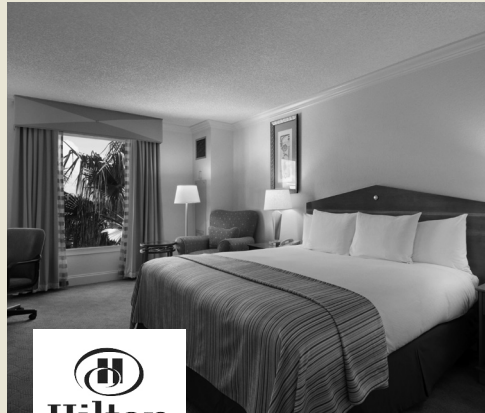


CONFERENCE REGISTRATION

The cost of the all-inclusive conference is \$599 for each participant. The fee includes an extensive conference manual, post seminar telephone consultation, lunch on both days, refreshments and receptions on Sunday and Monday evenings. Accommodations are on your own. A \$350 deposit is required with registration. Balance due on or before the first day of the conference. Register early as space is limited.

REFUND POLICY

Full refund (less a \$100 administrative fee) if you cancel in writing by January 31, 2020. No refund will be made if your cancellation is received after January 31, 2020. Partners in Mission reserves the right to cancel any program or activity due to low registration.



ACCOMMODATIONS

Hilton Naples is ready to exceed your expectations with a special rate of \$234 for Partners in Mission conference attendees. Please call 1-800-HILTONS to reserve your room.

Situated close to the best Naples has to offer in dining, shopping and family attractions, you will appreciate the numerous complimentary amenities including roundtrip shuttle service to the beach (complete with chairs, towels, and a personal cooler stocked with bottled water), garage parking, use of bicycles and wireless high speed internet in your guest rooms. Our centralized meeting rooms were designed to help you maximize time spent networking, mingling and energizing during your meeting. Featuring round-the-clock business and fitness centers, you'll find conveniences and special touches that pamper you as only a AAA Four Diamond Hilton hotel can.

And after the work is done, take time to enjoy award-winning dining at Shula's Steak House, walk to world-class outdoor shopping at the Waterside Shops, and relax on gorgeous beaches a short shuttle or bike ride away. Our dedicated team looks forward to making you the focus of our attention.

REGISTRATION FORM

- ☐ Please reserve ____ place (s) for **Partners in Mission Conference** from March 1 to March 3, 2020 in Naples, FL.
- ☐ Please reserve ____ place (s) for **Partners in Mission One Day Workshop** on March 4, 2020. Sessions run simultaneously, choose one.
- ____ Workshop 1 ____ Workshop 2 ____ Workshop 3 ____ Workshop 4
____ Workshop 5 ____ Workshop 6 ____ Workshop 7

☐ Check enclosed: \$ _____ ☐ Our check will follow: \$ _____

☐ Please send me additional information on other Partners in Mission services

Name _____ Title _____

Name _____ Title _____

Organization _____

Address _____

City _____ State _____ Zip _____

Phone _____ E-mail _____

Please make checks payable, and mail registration to:

Partners in Mission, LLC, 124 Sycamore Drive, Westwood, MA 02090.

If you have questions, call Larry Furey at (781) 710-0242 or lfurey@partnersinmission.com or Chris Hagerty at (814) 566-7500 or chagerty@partnersinmission.com. You will receive confirmation upon receipt of your registration form and payment. Final conference information will be sent to you in February and will include full details on the conference's daily schedule and activities.

Visit our website for more information: www.partnersinmission.com

INTRODUCING OUR KEYNOTE SPEAKER

Rev. Edward A. Malloy, C.S.C.

President Emeritus University of Notre Dame



Rev. Edward A. Malloy, C.S.C., completed his 18th and final year as president of the University of Notre Dame on July 1, 2005. He now serves as President Emeritus. As the University's 16th president, Father Malloy was elected by the Board of Trustees in 1986, having served five years as vice president and associate provost.

Father Malloy led Notre Dame at a time of rapid growth in its reputation, faculty, and resources. The University has seen a dramatic improvement in its financial aid resources, in the quality of its campus facilities, and in the diversity of its student body and faculty. It has fostered its distinctive identity as a Catholic university while gaining the recognition of its peer institutions, Catholic and non-Catholic alike.

Father Malloy earned his doctorate in Christian ethics from Vanderbilt University in 1975, and Vanderbilt honored him in 1998 with the establishment of a chair in Catholic studies in his name. He has also been awarded 25 honorary degrees. He earned bachelor's and master's degrees in English from Notre Dame in 1963 and 1967, and a second master's degree, in theology, in 1969 while studying for the priesthood. He was ordained to the priesthood in Sacred Heart Basilica on campus in 1970.

Father Malloy is presently on the boards of the University of Portland, St. Thomas University, Notre Dame Australia, Saint Mary's College and the Notre Dame Board of Trustees. In 2009 he completed two terms on the Vanderbilt Board.

— SAVE THE DATES FOR OUR 2020 CONFERENCES IN BOSTON! —

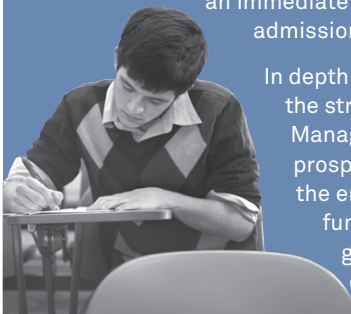
June 21-25, 2020 BOSTON, MA

The National Enrollment Management Conference for Catholic Schools™

A national conference exclusively for Catholic Elementary, Middle and Secondary Schools and Diocesan Systems offering proven strategies to ensure sustainability, affordability and accessibility of Catholic Schools.

Acquire the techniques, tools and strategies to make an immediate impact in your school's admissions effort.

In depth presentations will explore the strategy of Enrollment Management — moving prospective students through the enrollment management funnel from inquiry to graduation and everything in between.



June 21-25, 2020 BOSTON, MA

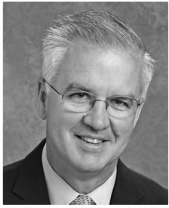
The National Advancement Conference for Catholic Schools™

Experience five intense days of learning, sharing, and fun with friends and colleagues from across America and return home with the wisdom, tools, plans and support you need to advance your program to a whole new level of success.

Centered in our faith and the mission of Catholic education, this experience promises renewed energy and rekindled passion for you and your important work in our Catholic schools.



Meet The Partners in Mission Team and Conference Faculty



Larry Furey
*Founder and Partner,
Partners in Mission*
Asst. Headmaster of Advancement
Xaverian Brothers High School (MA)
*Larry recently completed a \$25 million
capital campaign for Xaverian*



Chris Hagerty
*Senior Partner,
Partners in Mission*
**Director of Strategic Initiatives
(former)**
Cathedral Preparatory School (PA)
Villa Maria Academy (PA)
*Chris secured a \$23 million gift for Cathedral
Prep and Villa Maria Academy.*



Tom Brodnicki
*Senior Partner,
Partners in Mission*
**Vice President of Advancement
(former)** University of St. Francis (IL)
Director of Advancement (former)
St. Rita High School (IL)
*Tom's 45 years in the field turns your
capital campaign dreams into reality*



Dennis Buckley
Vice President of Advancement
Archbishop Stepinac High School (NY)
*Dennis has helped secure a
\$10,000,000 realized bequest*



Juana Sánchez Graber
**Associate Director for Hispanic
Outreach and Enrollment
Marketing Manager (former)**
Archdiocese of Chicago
*Juana led strategic efforts to promote
the value and accessibility of a
Catholic school education and improve
educational opportunities for Hispanic
students, in particular.*



Shana Rossi
Director of Admission
Padua Academy (DE)
*Shana will inspire and empower
you to optimize your school's
enrollment*



Kathleen Casey
**Associate Superintendent of
Schools (former)**
Diocese of Bridgeport, CT
*Kathleen translates her strategic
and marketing success in both
corporate and academic settings to
help Catholic school leaders optimize
mission and margin.*



Jennie Hagerty
**Director of Advancement
(former)**
St. Jude the Apostle Church and
Our Lady's Christian School (PA)
*Jennie has built an advancement
program that raises in excess of
\$500,000 annually*



Bro. Daniel Skala, CFX, Ph.D.
Headmaster
Xaverian Brothers High School (MA)
*Bro. Dan's 28 year tenure at Xaverian
is marked by exceptional innovation,
achievement and growth and two
capital campaigns of \$12 million and
\$25 million*



Al Catelli
**Director of Admissions
(former)**
Pope John Paul II High School (MA)
*Al has 20+ years experience
providing stability, growth, and
long-term viability to Catholic
elementary and secondary schools
across the United States*



Maria Ippolito
**Director of School Marketing
and Communications (former)**
Archdiocese of Chicago
*Maria led the efforts around the
development of the Archdiocese's
very successful Parent
Ambassador Program*



Chris Stiles
Director of Advancement
Mount St. Mary High School (OK)
*Chris has just completed a \$6 million
capital campaign.*



Jane DiGirolamo
**Chief Advancement Officer
(former)**
Our Lady of Good Counsel High
School (MD)
*Jane completed a \$10 million capital
campaign for Good Counsel, the largest
in their school history.*



Kathy Link
**Senior Director of Schools
(former)**
Healey Education Foundation (NJ)
*Kathy helped develop, launch and
train Boards of Specified and General
Jurisdiction across the county*



Bob Tift, Ed.D.
President (former)
Benilde – St. Margaret's School (MN)
*Bob's expertise includes governance
and Board development, and
strategic planning*



Cathy Donahue
**Director of Enrollment &
Marketing (former)**
Catholic Schools of the Diocese of
Bridgeport, CT
*Cathy is a strategic
communications professional
and dynamic coach for school
leadership aiming to grow revenue.*



Mary Lund
Director of Advancement
Mercy High School (CA)
*Mary raises over \$400,000
at her school's Scholarship
Luncheon each year.*



Steven Virgadamo
**Associate Superintendent for
Leadership, Archdiocese of
New York**
*Steven has consulted directly with
hundreds of schools in almost half
of the arch/dioceses of the United
States.*



Lauren Fredette
**Director of Advancement
(former)**
Bishop Fenwick High School (MA)
Trinity Catholic High School (CT)
*Lauren guided the Advancement
Program at Trinity Catholic that
raised \$145,000 over budget and
organized their first Legacy Gala
that raised \$133,000*



Kevin Quinn
**Vice President of
Advancement (former)**
Immaculata University (PA)
*Kevin brings over 25 years
of Catholic higher education
experience to Partners in Mission*



Kelli Wilson
Director of Admissions
Guerin Catholic High School (IN)
*Kelli is an energetic coach
bringing expertise in marketing
and communications as tools for
increasing enrollment.*



Zane Gizzi
Major Gifts Officer
Penn State College of Medicine (PA)
Director of Advancement (former)
Lancaster Catholic High School (PA)
*Zane built a Planned Giving Program
at Lancaster Catholic second to
none*



Grace Regan
President
Boston College High School (MA)
*Grace is the first female President
of Boston College High School.*



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www.partnersinmission.com