



# Holy Spirit Catholic Church

Catholic Education Fund  
(CEF)

## **Holy Spirit Parish Catholic Education Fund**

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## **I. Mission**

Establish and maintain an educational fund that offers unique financial aid opportunities to Holy Spirit parishioners for enrollment in Catholic primary and secondary schools.

This will be accomplished primarily by encouraging and promoting full Stewardship and tithing practices within the Parish thus creating more opportunities for newer programs to fulfill the Parish's needs, and by seeking to raise funds outside the Parish to support the effort.

## **II. Mechanics of the program**

- Start-up period in Academic Year (AY) 2007 will include: formulation of committees, fundraising activities, and public relation initiatives to establish the “presence” of the program within the Parish.
- Initial distribution of funds will be set as follows:
  - Eighty percent (80%) will be available for immediate distribution.
  - Twenty percent (20%) will be set aside for investment until an initial goal of \$250,000 is met. (i.e. when the fund is producing income - ideally with a 5% distribution rate.)  
The program investment goal will be reevaluated and adjusted after reaching this initial level.
- Program activities will be assigned to committees which will be overseen by program leadership.
- Council of Chairs will be comprised of one representative from each committee.
- Program Co-Directors will meet regularly with committees Chairs as a group and individually and will report on program development and progress to Monsignor on an interim and annual basis.
- Finance Committee will administer all funds received and will oversee all account related transactions.
- The Review Committee will be responsible for obtaining data from the Finance Committee, reviewing applications for tuition assistance, and determining award allocations.
- Applications for tuition assistance will be provided directly to the Review Committee for consideration and will be handled at all times as confidential material.
- A Personal Information Management (PIM) plan will be developed by program leadership and applied to ensure the appropriate handling and protection of all confidential information received by the program.

### **III. Application Requirements**

- Applicants must be Holy Spirit parishioners.
- Applicants must follow the Holy Spirit Parish Stewardship guidelines for one year before applying, the general rule of which is: 5% of the applicant's income is given to the Parish, 1% is given to the Diocese and 4% is given to other charities.
- Families must not be eligible for Diocesan funds (based upon their choice of Catholic school or other various financial factors) UNLESS they are eligible for Diocesan funding but are still unable to afford the unfunded element of tuition due to exceptional hardship at the exclusive judgment of the Review Committee.
- At least one member of applicant's family must actively participate in one of the Parish ministries.
- Applicant must not be a member of the Review Committee
- Applicants must comply with CEF application submission requirements (deadlines, etc.)
- All award decisions will be made at the judgment of the Review Committee.

### **IV. Goals and Objectives**

- Create and implement an effective fundraising strategy that will meet short term needs and long term objectives
- Launch annual fundraising activities at the beginning of each academic year (September)
- Raise a minimum of \$250,000 in first year
- Release award notifications in the spring semester for awards to be issued in the following AY
- Establish a presence for the program within the Holy Spirit community that best reflects the Catholic values of the Parish

### **V. Execution**

- Finalize program directives and operational guidelines
- Assign and organize committees for each programmatic area
- Set committee meeting schedules
- Obtain approval for all fundraising events and dates
- Prepare and maintain a potential donor list based on set criteria
- Prepare public relations/marketing materials (brochures, letterhead, etc.)
- Tap Parish children as a potential source for volunteers

## **VI. Committees**

- Organize membership based upon referrals
- Membership should reflect potential donor diversity and should not be limited to parents with children that are applying to the CEF program
- Committees shall include:

### **Development Committee**

Issue CEF related announcements at Mass and school functions  
Contact Holy Spirit parishioners, HSPS families, and other potential donors for donations and pledges  
Follow-up fundraising activities with direct mail correspondence (thank-you notes, etc.)

### **Public Relations Committee**

Generates and distributes marketing materials  
Circulates press releases to media  
Sets-up information booth at school functions (football games, etc.)

### **Special Events Committee**

Develops and implements all aspects of fundraising events  
Brainstorms to develop new events for the program

### **Finance Committee**

Provides funding data to the Review Committee  
Notifies HSPS of financial aid award and provides payment  
Oversees investment activities

### **Review Committee**

Receives and evaluates applications  
Allocates funding  
Notifies Finance Committee and applicant of tuition award amount

## VII. Schedule of Events

- Events schedule will include annual and non-annual activities

May            CEF Rollout Luncheon (*The Nagel Home*)

Suggested ongoing/annual events:

September    Children's Book Signing with children's book author / Ice Cream  
Social

December     Holiday Tour of Homes / Cookbook releases

February     Grandparents Day

May            Walk/Run for Education

August        Golf Tournament / Garage Sale

## VIII. Long-Term Plan

- Ensure that the program continuously meets its obligations, and goals and objectives while always preserving the dignity and confidentiality of those seeking assistance
- Establish an endowment that will cover all Holy Spirit parishioner financial aid needs for enrollment in Catholic primary and secondary schools