

Divine Mercy Eucharistic Society Fundraising Plan – West Coast Shrine

As Prepared and Presented By: Allan Shore, Development Consultant

The *Catholic Funding Guide* states in the preparation section that there are many pressures on religious organizations to be open, professional and transparent with their goals and financial records. As this resource guide makes clear:

“Catholic-oriented foundations today are exercising more caution in their grant making choices. They will require that proposals for assistance be developed with care.... Church-related charities and institutions that hope to be successful in enlisting support will have to be clear about their mission, have a compelling need, a well organized and capable leadership, an excellent fundraising plan with broad-based support, and superb accountability and financial transparency.”

This plan is designed to move the Divine Mercy Shrine of the West Coast in this direction. I anticipate that the passion, commitment and heartfelt faith in the project will continue to come from Thelma Orias’s leadership, and from the love and commitment of the many people who visualize the Shrine as a manifestation of God’s love and mercy.

We begin our fundraising plan with a prayer to St. Joseph:

O Blessed St. Joseph, Faithful Guardian of our Redeemer and Protector of the Mother of God, as our special Patron and Advocate in the building of our Divine Mercy Shrine, we firmly resolve to honor you throughout our lives and humbly beseech you to hear our prayers. We ask you to guide us in our work, to dispel our uncertainty and doubt, to keep us humble and respectful of each other, and to provide us with all the resources we need to complete our mission of building the West Coast Shrine and Retreat Center of Divine Mercy—all as we obtain the knowledge and love of our Merciful Jesus and our Lady, in fidelity to Our God. St. Joseph, protect us from the terror of demons: from distractions, division, pride, confusion, and all things which may keep us away from fulfilling this mission that we have been called to, through the love we share for His Divine Mercy and His true presence in the Most Blessed Sacrament. Amen.

FUNDRAISING OVERVIEW: I'm recommending a four-part strategy with each part beginning immediately to differing degrees. Each element is designed to reach out to one or more spiritual individuals or communities, or to professional donation organizations (such as foundations, investors, venture capitalists or banks). In identifying them in this manner I am trying to show how approaching them systematically can help them interact and support each other. I have not prioritized one as being more important than another at this point, except to the extent that some may be able to give larger dollar amounts. It is clear to me that your congregation and family of faithful have a spiritual and economic commitment to the Shrine that is, in many ways, more valuable than simple dollars, but we also need the major gifts to move the entire project forward.

Perhaps the strength of prayer will ensure that the value of each element rise together to toward the heavenly result.

The details are noted through this document. But here is a summary of the significant tasks that I expect to complete in January and February to get the project moving:

- ❖ Write the narrative of two letters of intent—short 2 page descriptions with one focused on large requests and one focused on targeted smaller requests.
- ❖ Write a comprehensive, large (10 to 15 page) proposal narrative that at least begins to provide many more details about the project and how the early funds will be used. (This will be used as needed or provided in response to an initial letter of intent.)
- ❖ Mail or email both of the following to approximately 25 potential funders (with about 2 to 3 receiving the full proposal and the rest receiving one or the other of the letter packages).
- ❖ Preparing the supporting materials to post them on the website.

These tasks correspond to our initial working contract. We can then advance our contractual relationship as the project moves forward.

STRATEGY ELEMENTS:

Major Foundations

This focus is on foundations (and potentially corporations, which sometimes act like foundations) that are capable of giving very large donations of \$200,000 or more. These entities exist to give big donations to religious or Catholic organizations and are generally supportive of capital, building, renovation or challenge grants. The idea is to generate sufficient funds to begin the physical alterations of the land and, possibly, to actually begin building some of the Shrine's foundation and supporting materials (such as the main gate, fencing, utility hookups, or a temporary structure). These dollars will also be the basis for any type of match or incentive grant. Often funders like to use their donations as a way to encourage other donors to make substantial gifts of their own.

STRATEGIC GOAL: The ideal, at this time, is to try to identify one or more major foundations capable of committing to \$2 to \$3 million, which will serve to generate \$1 to \$2 million from other sources. This will help us to achieve Phase I. (See budget overview.)

The major foundations we have identified so far include:

- ✓ The **Kock** Foundation, 352-373-7491 (pg. 92, Catholic Funding Guide)
- ✓ Wayne & Gladys **Valley** Foundation, 510-466-6060 (pg. 60, CFG)
- ✓ Ernest *or* Julio R. **Gallo** Foundation, 209-341-3090, 341-3141 (pg. 37, CFG)
- ✓ The Carl Gellert and Celia Berta **Gellert** Foundation, 415-255-2829 (pg. 38, CFG)
- ✓ Conrad **Hilton** Foundation, 310-556-4694 (pg. 42, CFG)

The first two foundations will be mailed a package in early February. The remaining will follow as soon as feasible.

Most of the time these foundations require short letters or full proposals, which include such documentation as noted below. The Koch and Valley Foundations want short letters, so these will be readied first. Accompanying documents will include:

- Full Narrative (See below for Large Dollar Letter or Large Proposal, as requested).
- Itemized Budget
- Statement of Impact on Evangelization
- Official Catholic Directory
- IRS Determination Letter
- Supportive Materials

LONG PROPOSAL FORMAT: To do this I am preparing a 10 to 15-page proposal narrative along with something for each of the needed supplemental materials. **I will prepare this material and make it ready to the Gellert and Hilton Foundations, once the complimentary materials are ready by the end of February.**

SHORT PROPOSAL FORMAT: In other instances even the Major Foundations want a simple Letter of Intention to outline the project's reach and potential, at least as the first step. However, they still generally expect that other materials are readily available. For this I will prepare a 2-page overview, which hits all the highlights of the long proposal. In this instance though I will refer the foundation to the website where some of the more detailed materials can be readily seen. Many times when a simple letter is requested they will not even entertain pictures to support the letter. With quality items on the website the reviewers are more likely to experience the true impact of the glory you have in mind with the Shrine. **I will prepare this large-dollar Letter of Intent and prepare to send it to the Koch, Valley and Gallo foundations, most likely by February if the materials are ready.**

Minor Foundations

These foundations are the most numerous. They have many program interests, but generally do not exclude aspects of the Shrine if some creative planning is used. I envision approaching them

for specific, small-scale donations to accomplish direct tasks (such as building a temporary shelter where early visitors can see the project model and be protected from the elements, for example) that move the project forward. We can use these small grants to show progress and match any grants received from the Major Foundations.

We can usually approach these foundations with a short letter of intention that is also only 2 pages long. However, the appeal in this letter will be different, focusing on tasks to prepare the site (architectural plans, a model, etc.), the costs for preparing donor appeals, organizing materials, special projects like the temporary shelter noted above, and even creating the main gate, which is important for pilgrimages to the site. Requests will generally not be directed to the building of the site itself unless the foundations themselves allow this. Our goal with these requests is to fill in some of the smaller needs to make the larger project advance.

There are a large number of these Minor Foundations that might be applicable, with perhaps even more than I can list here. I have selected a number that we can write to within the next month, utilizing the short letter. The foundations include (page number is from The Catholic Funding Guide, 4th Edition):

- | | |
|--|---|
| Ahmanson Foundation (pg. 22) | William H. Hannon Foundation (pg. 41) |
| Arata Brothers Foundation (pg. 23) | Hofman Foundation (pg. 42) |
| Kathryne Beynon Foundation (pg. 25) | J.W. & Ida M. Jameson (pg. 44) FEB 1 |
| The Burns Foundation (pg. 27) | Thomas and Dorothy Leavey (pg. 46) |
| The Callison Foundation (pg. 28) JULY | Robert W. & Maura Burke Morey (pg. 48) |
| The Cassin Foundation (pg. 29) | Dan Murphy Foundation (pg. 49) |
| Celebrate Foundation (pg. 30) | Pacific Western Foundation (pg. 51) |
| John & Geraldine Cusenza Family (pg. 31) | The Ralph M Parsons Foundation (pg. 51) |
| J. Philip & Jennier DiNapoli (pg. 34) | Mary R. & Joseph R. Payden (pg. 52) |
| Carrie Estelle Doheny Foundation (pg. 34) | The August Sebastiani Trust (pg. 54) |
| Foster Charitable Trust (pg. 35) | The Selders Foundation (pg. 55) |
| Joseph I. Friedrich Foundation (pg. 36) | Cynthia L. & William Simon (pg. 57) |
| Silvio Mary Garaventa Family (pg. 37) | Y. & H. Soda Foundation (pg. 57) |
| Giannini Family Foundation (pg. 38) | Robert S. & Helen Pfeiffer Odell (pg. 58) |
| James OR Katherine Gleason (pg. 39) | Wakerly Family Foundation (pg. 61) |
| Stella B. Gross Foundation (pg. 40) | Wiskemann Family Foundation (pg. 61) |
| Crescent Porter Hale (pg. 40) | Henry & Carol Zeiter Foundation (pg. 62) |

I expect to utilize the small letter of intent and prepare a package of materials to send to each of these foundations by the end of February, if all the required materials are ready.

Banks/Investor Institutions

For a project of this nature, there will come a time when other professional financial investors and/or banks will have to be involved. This can even include various faith-based or church organizations. Sometimes these entities can be charitable contributors of money and/or providers of free or low-cost services as they serve as helpful project associates who can facilitate construction cash flow and operational assistance. Making good connections with these kinds of

businesses or individuals is a good thing to do from the very start. I recommend that as we talk with potential individual donors (see below) we ask if they have any recommendations for quality investors or banks.

It might also be feasible to borrow money from one of these businesses—perhaps with the help of a congregational connection or by making a prayer connection—to use those dollars to make the monthly land-lease payments. It is possible that a loan from a bank of \$250,000, for example, could be used to make the monthly land payments of \$25,000, with Mercy simply paying back to the bank an amount of much less (say \$10,000 per month) toward repayment of the loan. This would ensure that the land is not lost and help establish a good credit/fiscal relationship with the bank. Other investors may then be asked to help re-pay the loan, thereby reducing the project's debt as a way of freeing money for other purposes.

I would approach the major people on your board of directors and advisory board to find out about this possibility.

Personal/Individual Donors

You have clearly shown that many of your immediate following have both the spiritual and monetary capability of making significant personal donations directly. This capacity needs to be explored in several ways.

I would recommend identifying, by name, as many of the 160+ folks who regularly attend your services and ask them, in as comfortable way as possible, whether they might be able to make a tithing commitment toward this project of some amount. During this process, you can also talk with each of the people who made a contribution already and see if (or when) they might once again be able to help.

It is very clear to people who raise money regularly that the people most likely to give are those who have given in the past. While we may not be able to get cash donations from each of them immediately, a commitment to future donations will make it more likely that we can achieve future needs and provide to major donors a list of people who will match their gift.

I would also recommend that you start a graphic representation of a measure of the success of the campaign. I will provide a sample of this kind of item that can be posted on the website as well as within (or near) your Chapel to remind regular attendees of the project and how the project can be included in their hearts and prayers.

Reaching out to others is also important. It is critical to have those who are closest to Divine Mercy Eucharist Society to help find others with the financial ability to help. I would begin by having a face-to-face meeting with most of the people on your advisory board and/or board of directors to discuss who they know who can help. You might be surprised as to how much potential can be found here once we are able to show everyone the materials and ideas we have put together to demonstrate that the West Coast Shrine is on-track and receiving God's blessings.