



The Serra International Foundation

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## **Serra Club Foundation Representative Manual**

*I encourage you to be true friends to seminarians and priests, showing your love for them by promoting vocations and through prayer and pastoral cooperation. Please, keep pressing forward! Forward in hope, forward with your mission, ever looking beyond, opening new horizons, making room for the young and preparing the future. The Church and priestly vocations need you.*

— His Holiness Pope Francis, 75th Serra International Convention, Rome, June 2017

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## **INTRODUCTION**

### ***A Call to Service***

The role of Club Foundation Representative is a call to service: to serve the Church by supporting the work of Serra International Foundation, to give financial assistance to vocation programs that bring more “fellow laborers with Christ” to his harvest, to serve fellow Serrans by giving them the opportunity to know about and participate in a cause they can love and support, and to serve future generations of souls by helping to give them shepherds and servant leaders.

### **PURPOSE OF THIS MANUAL**

This manual is intended primarily for use by the Club Foundation Representative for promoting the Serra International Foundation mission and fundraising projects among club members. It will also be helpful to the Club President, the District Governor, the Regional Director, and other club officers involved in promoting Serra International Foundation.

## **Resources**

- Communications from the Director of Development to keep you informed and give you guidance in performing your role. You will receive sample scripts for your club presentations, as well as sample articles and/or announcements for your club newsletters.
- Professional consultation from Foundation staff
- The winter edition of *The Serran* magazine provides information on the annual fund, special gift opportunities, reports on the use of gift funds, and recognizes donors
- Brochures, cards, gift envelopes and other printed information and materials available from the Foundation staff
- Training webinars
- YouTube videos
- Templates for club presentations

## **PURPOSES OF THE SERRA INTERNATIONAL FOUNDATION**

### **The purposes of Serra International Foundation are:**

- to give financial aid to programs that foster and promote vocations to the ministerial priesthood of the Catholic Church;
- to give financial aid to programs of formation for men and women in consecrated religious life in the Catholic Church; and
- to enhance the recognition of Serra International as the global lay apostolate for vocations in the Catholic Church.

## **PURPOSE OF A CLUB FOUNDATION REPRESENTATIVE**

The Club Foundation Representative is a member of the club's leadership team, serving on the board of directors for a term determined by the board (2-3 years is recommended). You are the personal link between Serrans in your club and our Foundation, providing a direct line of communication between your club and the Foundation. Serrans are generous people, so, our challenge is to channel that generosity toward helping the Foundation advance the mission of Serra International. The Foundation's success depends on your efforts.

### **Responsibilities:**

- Educate Serrans about our Foundation
- Promote our Foundation's Annual Appeal in your club
- Encourage members of your club to remember Serra in their estate plans
- Promote all Foundation giving programs, including memorial and honor gifts
- Supply and display Foundation brochures and materials at meetings
- Serve as communications liaison between your club and our Foundation

## **THE CASE FOR SERRA INTERNATIONAL FOUNDATION**

### **History**

Serra International Foundation was organized in 1951 to help Serra International fulfill its objectives of effectively working for vocations in the Catholic Church and developing lay leader's vocation to Christian service. Since its beginning, the Foundation has funded a wide range of projects that have helped Serra foster vocations to the priesthood and religious life.

Serra International is not a fundraising organization: its primary methods are prayer and action; and the Foundation's role is to support and compliment these methods, not to eclipse them. Nevertheless, the importance of the Foundation's role has never before been greater.

## **Urgent Need - Priests and Religious Vocations**

Since the onset of the vocation's global crisis in the Church, Serra International Foundation's role has increased in significance and importance. In the United States and in many parts of the world, there has been a dramatic decrease in the number of active priests and religious due to fewer men and women choosing these vocations and aging populations among both priests and religious.

During this same period, the Catholic population has grown, causing the number of Catholics per active priest to increase. Moreover, it is estimated that within the next fifteen years, at least half of all priests serving today will be retired.

## **Turning the Tide**

In the midst of this crisis, Serra International Foundation is advancing a mission that is based on hope and action. While this hope is supernatural, it is confirmed by the success in promoting vocations of many programs, projects, and initiatives made possible thanks to the Foundation.

## **The Need for Serra**

At the 75th Serra International Convention in Rome, His Holiness Pope Francis declared:

*There is another phrase that describes [Serrans]. You chose it for the theme of this convention: Siempre Adelante! Keep moving forward! Like you, I believe that this is a synonym for the Christian vocation. For the life of every missionary disciple bears the impress of his or her vocation. The voice of the Lord invites his disciples to leave the safety of their homeland and to begin the "holy journey" towards the promised land of encounter with him and with our brothers and sisters. Vocation is an invitation to go forth from ourselves, to rejoice in our relationship with the Lord, and to journey along the ways that he opens up before us.*

In particular, Serrans are in a position to provide three potent elements that will be crucial for sustaining and improving these hopeful trends into a new era of growth for vocations:

- Prayer - If you ask any successful Vocation Director what the most crucial element for success is, prayer will almost always be the first mentioned.
- Lay Involvement - The laity must join in the effort by giving their time, by inviting people to discern their vocations, and by creating a climate and culture in which vocations can flourish.

- Financial Support - Promising new ideas need a chance to be tried, proven methods need to be continued and replicated, and Serra's outreach must be extended.
- Active participation in each of these elements will create a more impactful Lay Vocations Arm of the Church, as our Holy Fathers have consistently challenged Serra International to be.

### **The Role of the Foundation**

The Serra International Foundation provides Serrans with a vehicle for channeling their generosity to help make this happen. Through our Foundation, Serrans help with:

- Strengthening and advancing the work and growth of Serra International in the United States and throughout the world.
- Funding projects and programs that show promise or have proven successful in promoting vocations.
- This support will assist Serra International in partnering with the Church in turning the tide on Church vocations.

### **WHAT SERRA INTERNATIONAL FOUNDATION SUPPORTS**

Since 2005, Serra International Foundation has given over \$3 million to advance the mission of Serra. The Foundation receives many more worthy requests than it is able to fund. What the Foundation is able to fund depends on the generosity of Serrans.

### **How the Serra International Foundation is Supported**

- Annual Giving Appeal: Letter sent to all Serrans in the US
- Special projects, such as the 2020 San Gabriel Mission Restoration Project and the 2015 Spread the Word Campaign (projects are added as needs are identified; not every year)
- Memorial and honor gifts
- Major gifts (over \$10,000)
- Grants from foundations and other organizations

## DONOR RECOGNITION

Individual donors to Serra International Foundation will receive thank you letters for their contributions. Those whose cumulative giving in any year is \$100 or more will be recognized by name within their giving level in the winter edition of *The Serran* magazine. Club Foundation Representatives and Club Presidents are encouraged to arrange any local public recognition of donors in their clubs they deem appropriate.

### Individual Recognition

Serra Gold	\$5000+
Serra Leadership	\$2500 - \$4999
Serra President	\$1000 - \$2499
Serra Partner	\$500 - \$999
Serra Associate	\$250 - \$499
Serra Friend	\$100 - \$249
Other	up to \$99

Serra Clubs whose gifts total \$1,000 or more within a given year will be listed in the winter edition of *The Serran* magazine and will be recognized at the annual convention of Serra International. Club giving totals include gifts from the club itself, as well as gifts from their members.

### Club Recognition

Majorca Club	\$10,000+
Carmel Club	\$5,000 - 9,999
Padre Club	\$3,000 - 4,999
Mission Club	\$2,000 - 2,999
Banner Club	\$1,000 - 1,999

## THE STRUCTURE OF THE SERRA INTERNATIONAL FOUNDATION

### The Serra International Foundation Board

The Serra International Foundation is governed by a twelve-member Board of Trustees, which is responsible for raising money for the Foundation, as well as making decisions on governance, policy, investment, and grant allocations.

### Foundation Staff

The Serra International Foundation board retains a Director of Development (DOD) to implement the Foundation's Strategic Plan, directing the fundraising

### **The St. Junipero Society**

The St. Junipero Society honors donors who make a major planned gift to the Serra International Foundation and communicate their intention to the Foundation. Members who make this lifetime commitment are honored at the annual Serra International Convention or other appropriate venue.

program for the Foundation. He/she works in partnership with the Serra International staff. The DOD is a skilled, experienced fundraising professional who provides guidance and counsel to the Board, the CFRs and other Serra officers. The DOD is your “best friend.” This professional fundraiser is at your disposal. You will be successful in your role as Club Foundation Representative by encouraging your members to participate in the annual appeal and by identifying members of your club who you believe are ready and able to make more significant gifts and introducing them to the DOD.

The Director of Development is responsible for all fundraising activities of Serra International Foundation. He/she works one-on-one with individuals who wish to make special donations, such as estate gifts, major gifts, gifts of appreciated securities, rollover gifts from individual retirement funds and donations from donor advised funds. The Director of Development is available to assist you with your questions and also to speak with members who would like to explore one of these gift options.

### **Serra Officers**

Other officers in Serra International also have a role to play in helping to advance the Foundation. The District Governor is responsible for making sure each club in the district has a Club Foundation Representative, and that that person is doing the job. The Regional Director of the National Council supervises the District Governors. Both of these officers are routinely asked to play coordinating roles in the advancement of the Foundation.

## **FUNDRAISING TECHNIQUES THAT WORK**

Each Serra Club is unique, and the fundraising techniques that work best will vary with each club. However, there are some underlying principles:

- The main reason people do not give to a worthy cause is because they are not asked: You will be surprised at the response you get when you ask.
- People give to people: Your main advantage in encouraging club members to give to the Foundation is that they know you.
- The most successful and convincing fundraiser is one who makes their gift before asking others to contribute. Ask for support for a compelling initiative: Share the great works of Serra which increase vocations.
- Make it personal: The more personal the request, the better. The more you can do to personalize the Foundation's appeal for help — through phone calls, speeches, letters, conversations, etc. — the better the result.



Below are some techniques that have worked in Serra Clubs across the United States. Since you know your own club members best, you can use your own judgment and creativity to decide which techniques to use.

- Reserve at least two meetings per year to discuss the Foundation — many people do not give because they have not heard the good news about the Foundation. Sample scripts will come from your Director of Development.
- Several CFRs have found it successful to send an email or personal note prior to the Foundation's appeal letter, encouraging club members to give. A writing sample will come from your Director of Development.
- Use the telephone: call club members before the appeal to obtain a pledge. Call club members later in the appeal to remind them to make their gifts. Concentrate especially on those who have made large gifts in the past, on those who gave last year but not this year, and on those whom you think could and might make gifts if only they were asked.
- Make in-person requests. Remember, fundraising and vocations recruitment are very similar: personal invitation is crucial.
- Be confident in your role to encourage generosity: Without funding from individual Serrans, the Serra grants would not be available to support world-wide activities which encourage and lead to vocations.
- During Annual Appeal season, give your club a brief update and pep talk at least once each month, if possible. Remind your club of how close they are to the next banner status.
- Place announcements or stories on the Foundation in your club newsletter.
- When you receive a donations report from the Foundation, call donors to personally thank them.
- Engage and educate your board by sharing reports, news and plans that come from the Foundation with them.

## CLUB FOUNDATION REPRESENTATIVE CALENDAR

### Summer

- Club Foundation Representative is appointed or re-appointed and will receive training via webinar provided by the Serra International Foundation.
- Present plans, reports and updates from the Foundation to the board as you receive them.
- CFRs will be recognized for their service at the annual Serra International convention.

### Fall

- CFR talks with Club President and Club Board about goals and strategy for promoting the Foundation Annual Appeal in the club.
- CFR secures a place on future club meeting programs to promote the Annual Appeal.
- Begin promoting Annual Appeal in the club through presentation or other techniques like YouTube and Zoom.
- Foundation appeal letter will be mailed from Serra International in November.
- CFR reminds club members that donations must be postmarked by December 31 to be counted on current-year's taxes.
- Announce to members that *The Serran* magazine that comes out in November is the Foundation issue and that they will find information about how gifts were used.

### Winter

- Report to the board and club the success of the annual appeal. Thank everyone for their generosity.

### Spring

- Share with Club members the projects funded by Serra International Foundation.
- Club Foundation Representative is up for re-appointment.

## NOTES

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