

“This volume goes beyond theory in providing many illuminating examples that can be replicated with considerable practical hands-on wisdom about fundraising. Bravo!”

Barry Z. Posner, PhD, Michael J. Accolti, S.J. Professor of Leadership, Santa Clara University

“Contributors tell their stories passionately and jargon free, making this an engaging book accessible to the professional and layperson alike.”

Dennis Conroy, Senior Vice President, External Affairs, Metropolitan Family Services, Chicago

“I truly loved the book and found it to be so very Vincentian, grounded in tradition, simple and straightforward, organized and practical. I will be using it.”

James D Davis, RN, Consultant, Mission and Ethics, Seton Family of Hospitals

“This is a book about fundraising—by Vincentians—for Vincentians. It finds our search for funds in our spiritual roots while providing practical, actually-used fundraising methods by United States Vincentians across the Family.”

Sheila Gilbert, President National Council of the United States Society of St. Vincent de Paul

“This short, easy-to-read book is both inspirational and practical. From Vincent, the reader learns three valuable insights that are as relevant today as they were 400 years ago: Respect donors; prepare fundraisers to understand that this work is a sacred ministry; and reverence the recipients.”

Georgette Lehmuth, OSF, President and CEO, National Catholic Development Conference

“This ground-breaking new work offers a comprehensive overview of the complexity of charitable fundraising. This book melds what Vincent de Paul called the “practical and the possible,” with case studies and stories from dedicated and experienced people in this field.”

G. Gregory Gay, C.M., Superior General, Congregation of the Mission

“This book is a stimulating and useful resource for fundraising with a social conscience....a serendipitous collection of practical vignettes – motivated by compassion and service.”

*Joseph McCann, C.M., PhD, Professor Emeritus, St. Patrick's College & All Hallows College,
Dublin, Ireland*

Fundraising Strategies
Stories from the Field
Inspired by St. Vincent de Paul

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VINCENT ON LEADERSHIP: THE HAY PROJECT



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Introduction

The Story Is Vincent

*I cannot tell you how much alms have diminished here and the
difficulty of finding any loans. Everyone is being affected
by the misery of the age.*

—Vincent de Paul

YOU MAY BE asking yourself, “Do I need to read another book on nonprofit fundraising?” Simply stated, our answer is, “Yes—this one.”

There are two reasons we make this claim. First, the wisdom and practical tips you will read in this book are time-tested. How much time are we talking about? Nearly 400 years. This book demonstrates the leadership legacy of St. Vincent de Paul (1581–1660), who began life as the son of a peasant farmer and ended up sowing seeds of a different kind—a work others continue today. The Catholic Patron Saint of Charity, Vincent founded his first organization to offer service to the poor in France in 1617. His organizational and management brilliance were such that this organization, known in the United States as the Ladies of Charity, still exists today. Vincent said, “The poor suffer less from a lack of generosity than from a lack of organization.” He set about to correct that by organizing the first systematic approaches to social service.

Second, we are convinced you will be inspired by what you read here to recommit yourself to the work you already are doing to be of service and to create your own legacy. In these pages are never-before-told stories of Vincentian organizations around the world, run by people who follow Vincent's maxim: "It is not enough to do good, it must be done well." In addition to the Ladies of Charity, those organizations include the Congregation of the Mission (Vincentian priests and brothers), the Daughters of Charity, the Society of Saint Vincent de Paul, Depaul International, and many other organizations worldwide.

There are more than 1,500 biographies written about Vincent de Paul. This is the only book written about raising resources that support the mission to serve the poor that he launched long ago.

How to Read This Book

Our intention in creating this book is to help you be better at what you are already doing. How that happens is largely up to you and the degree to which you put what is here into practice in your own life and organization.

At the end of each chapter are some discussion questions. We hope you will use these with your team to spark conversation on how to lead change and improvements in your own organization.

In Chapter 1, authors Steve Martinez and Roger Playwin explain the comprehensive, time-tested, and personalized Vincentian approach to helping individuals in need through the story of the St. Vincent de Paul Society's response to Hurricane Katrina.

In Chapter 2, John Rybolt, C.M., a noted Vincentian scholar, explores the enduring nature of Vincent's legacy. People who know his story admire Vincent for his extraordinary ability to connect both rich and poor to his mission. The author offers behavioral examples of Vincent's transparency and responsibility to donors.

Chapter 3 tells the history and present activities of the Ladies of Charity, the oldest of Vincent's organizations. This international organization will celebrate its four-hundredth anniversary in 2017.

INTRODUCTION

In Chapter 4, Mark Pranaitis encourages nonprofit leaders to go after major and planned gifts. This encouragement, says Pranaitis, is rooted in Vincent's call to not only serve the poor, but to do it well.

In Chapter 5, you'll read about young Vincentians in Denver, Colorado. As explained by the group's founders Mary Frances and Bill Jaster, the Colorado Vincentian Volunteers is about providing resources and support for young people who want to give a year of service.

Chapter 6 offers practical advice on talking with donors about how their relationship with your organization's mission can continue even after death. The author, Vincentian priest Charles Shelby, has decades of experience in the area of planned giving and speaks frankly about its challenges and rewards.

In Chapter 7, you will meet Bill and Mary Pat Gannon Hay, two contemporary examples of how the Vincentian legacy has inspired extraordinary service, commitment, and the very tangible giving of self and financial resources.

Chapter 8 tackles one of the most difficult aspects of fundraising: moving beyond rejection. Author Teresa Manna first recognizes its emotional impact. Then, using examples from her own and others' experiences, she helps us to move beyond the emotion and "reveal the redeeming value of rejection."

In Chapter 9, the authors Mark McGreevy and Lianne Howard-Dace tell the story of how Depaul International has grown from a \$300,000 per year charity founded 25 years ago in England to one that today raises \$30,000,000 annually and has an international presence. Depaul demonstrates Vincent's timeless appeal and his mandate to be creative to infinity.

In Chapter 10, J. Patrick Murphy illustrates several practical, alternative sources of revenue for nonprofits, including examples of Vincent-inspired organizations creating modern streams of revenue for their mission.

Even as Pope Francis today is renewing the Catholic Church by emphasizing its original mission to care for the poor and reforming the Roman Curia from the inside, St. Vincent de Paul reformed the church

of France from the inside by educating and forming the clergy. This book's authors offer a great deal of wisdom and insight about Vincent and fundraising from their experience—practitioners writing from the heart about the good being done in Vincent's name 400 years after he launched his organizations to serve the poor.

1

Disaster Preparedness *A Vincentian Response to Katrina*

STEVEN F. MARTINEZ AND ROGER PLAYWIN

Doing good isn't everything; it must be done well.

—Vincent de Paul

It's easy to remember the headlines: "Death..." "Destruction..." "Complete Devastation..." "Catastrophic..." "Under Water..." "Millions Stranded..." "Gone—We Lost Everything." Iconic visuals showed the New Orleans Superdome's thin roof ripped off. Thousands of people were stranded inside, running out of water and food, with no place to sleep, no police to maintain order, no plan for evacuation, and family members missing.

In August 2005, Hurricane Katrina, the most destructive storm ever to strike the United States, hit the Southeast. It is hard to envision the power of such a storm—a Category 3 hurricane, with winds reaching 140 mph, 100-foot waves, and a storm surge more than twenty-eight feet high. The storm caused an unprecedented devastation along the coasts of Louisiana, Alabama, and Mississippi, covering more than 90,000 square miles (the size of Great Britain). Eighty percent of New Orleans was under water. Water as deep as twenty feet flooded major roads,

bridges, homes, office buildings, highways, and airports. More than 1.7 million people lost power in the Gulf States and another 1.3 million were similarly affected in Florida. Damage estimates for Hurricane Katrina topped \$75 billion, making it the most costly hurricane in history.

Being prepared for disaster is one of the most crucial reasons nonprofits must do all they can to be fully funded and optimally organized around core values.

It's times like these that make the more mundane efforts at fundraising so critically important. Being prepared for disaster is one of the most crucial reasons nonprofits must do all they can to be fully funded and optimally organized around core values. With those elements firmly established, it is possible to spring into action at a moment's notice.

Vincentians Respond to Katrina

Members of the Society of St. Vincent de Paul—or “Vincentians”—strive to grow spiritually by offering person-to-person service to individuals in need. Consequently, the Society of Saint Vincent de Paul (SVdP) responded to Katrina on all levels within its organizational structure.

Chaos ensued immediately after this horrific event. The sheer volume of calls for assistance and of individuals showing up on local SVdP office doorsteps was overwhelming. Katrina tested the channels of communication within the organization as well as the character of its members.

When you have lost everything except the clothes on your back, you can only pray and ask God to direct you to where there is hope. I found that hope at the Society of Saint Vincent de Paul Katrina Aid Assistance Program. (Hurricane Katrina evacuee, *Response to Katrina*, p. 113.)

The Vincentians' response was deeply embedded in the founding Vincentian Principles of the Society. These principles guide the spirituality of the Vincentians and have a dramatic effect on the manner in which Vincentians respond to people seeking assistance.

St. Vincent de Paul (1581–1660), a Catholic priest and a man of deep faith, keen intellect, and enormous creativity, has become known as the “The Apostle of Charity” and “Father of the Poor.” His contributions to the training of priests and organizing parish missions and other services for the poor shaped the Catholic Church’s role in the modern world. Vincent’s lifework was to bring together for-profit, nonprofit and government sectors to serve the poor. He provided leadership, vision, problem-solving skills, and love to attract countless people into service.

“We must do what is agreeable to God.”

The codification of Vincentian principles of service to the poor as an expression of Christ trace back to 1833, when Frederic Ozanam and six college students defined the organizational values that became the basis for SVdP. These core values frame SVdP’s vocation, values, spirituality, prayers, rule, and mission. Ozanam’s vision inspired the Vincentian movement to expand into an international charity network. He wrote, “We must do what is agreeable to God. Therefore, we must do what our Lord Jesus Christ did when preaching the gospel. Let’s go to the poor!” SVdP was established on this vision (*Manual*, p. 9).

Vincentians are called to a vocation, an intimate desire to participate in helping the needy through person-to-person contact and a desire for spiritual growth as found in service to the suffering and poor. Vincentians are women and men who seek personal holiness by providing direct assistance to the poor through food, clothing, housing, medical goods, and other forms of aid. People from every ethnic and cultural background, age group, and economic level honor this calling. The deep

inner belief that guides Vincentians is the commitment to treating all individuals with dignity, compassion, and respect. This commitment has lasted for centuries and spread around the world.

Organizational Structure a Good Foundation

No single organization could have been completely prepared to meet all the needs created by Hurricane Katrina. However, the structure of the SVdP provided an effective channel for responding to local disasters. Local SVdP actions involved much more than the typical Vincentian response to a more limited disaster (such as a home fire or flood). According to its bylaws, the Society of Saint Vincent de Paul National Council (SVdPUSA) provides disaster-relief services. It has a standing disaster-services committee and is authorized to provide assistance under the Stafford Emergency and Disaster Assistance Act. Authorizing the U.S. president to make emergency declarations that trigger aid from 28 federal agencies and outside organizations, this act also created the Federal Emergency Management Agency (FEMA) and gives it authority to recognize relief and disaster-assistance organizations (nonprofits authorized to provide disaster assistance).

Until Katrina, the SVdP had never been called on to provide services under the Stafford Act. Once Katrina struck, however, SVdP received authorization to assist relief efforts through a memorandum of understanding and other agreements with volunteer organizations and governmental agencies. The services provided by SVdP included emergency shelter, mental health services, health services, first aid, medical assistance, food service, social services for basic needs, and services to volunteers.

The SVdP identified 606 of its 4,500 U.S. regional units or “conferences” as heavily affected by Katrina. Shreveport, Biloxi, and Baton Rouge were in the direct path of the storm. The relocation of 1.9 million people strained many conferences beyond these states.

Michael Acaldo, executive director of Baton Rouge SVdP, said, “We were working here before the hurricane. We are an organization with no red tape or bureaucracy. We are where the rubber meets the road. We are here with food and clothing, all the necessities to make a difference in the life of someone who may have lost everything” (*Response to Katrina*, p. 12).

The Baton Rouge Conference, which usually provided 13,000 meals at one location, found itself serving 43,300 meals at various locations throughout the community. In the first few weeks after the storm, the conference distributed 150,000 articles of clothing to more than 31,000 people through the local SVdP thrift store. Trucks delivered loads of crucial goods such as water, diapers, clothing, food, furniture, appliances, and medications.

A testament to how Vincentians responded was captured in the Hurricane Katrina Case #11 Report (*Response to Katrina*, p. 73): “The house [the Katrina victims] were living in had no furniture, chairs, beds, or appliances. Their assessment was completed while sitting on the bare floor. Within days, Vincentians were able to secure beds for all the family members and, in partnership with a local church, secured a stove, refrigerator, washer, and dryer.”

In the aftermath of Hurricane Katrina, requests for assistance flooded the SVdP local conferences. Stretched beyond their normal capacity, the conferences looked to the next level of the organization, SVdP councils, for help. Councils routinely operate autonomously in disasters, but because of the far-reaching devastation and the large number of evacuees transported into many different council areas, they, too, were overwhelmed. Evacuees were transported directly to safe areas with nothing but the clothes on their backs. Many were separated from family members, creating the need for a system of communications throughout the SVdP and other first responders.

Six of eight SVdP regions were overwhelmed. In just one month, for instance, Houston served more than 51,000 individuals; received more than 800 daily calls; and provided \$3 million in food, clothing, and

medical supplies. Baton Rouge served more than 50,000 and provided 170,000 items of clothing. In Atlanta, the SVdP served 18,000 people, spending more than \$1.7 million for basic materials for evacuees. San Antonio served more than 25,000 individuals. In a brief period after Katrina, SVdP councils across the country had served more than 125,000 survivors, providing food, clothing, medical supplies, and logging more than 32,000 volunteer hours.

Creation of the National Disaster Relief Coordinator

The regional structure quickly became overloaded. The national council of the SVdP sprang into action, creating the temporary position of national disaster relief coordinator. This position was responsible for expediting communications about unmet needs of disaster victims, coordinating resources, and formulating optimal practices even while supporting the autonomy of local councils. This proved invaluable, as the national office fielded huge volumes of calls each day seeking money, food, water, and clothing.

The coordinator had extensive experience as the chairman of disaster operations for the American Red Cross in the St. Louis region. He knew what needed to be done and was able to accomplish it quickly. He first executed a memorandum of understanding with FEMA. His methodology was introduced in the SVdP chapters across the country, showing how they could take leadership roles as strategic partners in providing disaster relief and establishing the SVdP as an “official relief organization.” This also encouraged federal approval for support services with a connection to a stream of income to assist with basic emergency services.

The SVdP national council fielded thousands of calls and coordinated the distribution of millions of dollars of in-kind items to councils across the country. For example, an anonymous donor offered truckloads of household “set up packages” (beds, linens, kitchenware, dressers, tables, and more). These items were high priority but also created a challenge, since the SVdP conferences and councils were already overwhelmed. The

disaster coordinator identified open SVdP warehouse space throughout the SVdP and brokered the donation. With precision, tractor-trailers filled with supplies (valued at \$3.5 million) delivered goods from across the country to the disaster's front lines. The donor was so impressed with the SVdP's abilities, he made a second donation—valued at \$4 million—for distribution by the SVdPUSA national disaster coordinator.

*The donor was so impressed,
he made a second donation.*

The coordinator signed a letter of agreement with Matthew 25 Ministries (M25M)—an international Christian humanitarian relief organization known for helping the poorest of the poor—to provide containers and semi-trailers of materials and supplies to meet basic needs.

In response to the outcry for case management services across the country and the vast experience of SVdP Vincentians in conducting person-to-person evaluations over the last 160 years, the national disaster coordinator submitted a grant proposal to the United Methodist Committee on Relief (UMCOR) for national case management services. Fifteen SVdP councils participated.

A selling point to UMCOR was SVdP's national network of 4,100 parish-based conferences and 451 diocesan and district councils that could further enhance the goals of this project. The grant provided \$6 million, and SVdPUSA generated an additional \$8.3 million of in-kind contributions.

Finally, the SVdP national disaster coordinator secured a state-of-the-art mobile kitchen called Hope, a commercial-grade kitchen capable of serving 10,000 people per day. Walter McKenna, CFO of Specialty Brands of America, made the donation. Built at a cost of more than

\$400,000, the national board of the SVdP received the asset, and it is now available to respond to emergency disasters of any kind.

Motivated by Spiritual Growth

What did we at SVdP learn from Vincentian responses to this large-scale disaster?

First, while the SVdP structure is readily able to handle smaller local disasters, the conferences and councils can be easily overwhelmed in larger emergencies. In large-scale disasters, regional support is limited to being a communication channel. By far the smartest strategy was the temporary hiring of the national disaster coordinator. This was key in creating a single point for communications, donations, and distributions.

To encourage growth and readiness, organizations must emphasize core values.

Second, and most importantly, the Vincentian response was a testament to the importance of the founding Vincentian principles given to the SVdP by Ozanam and practiced by Vincent himself. To continue the growth and readiness of the SVdP, conferences and councils must emphasize core values and “Vincentian formation.”

Vincentians are better equipped to meet overwhelming needs quickly and efficiently because of common core values and their experience acting on these values. These values enable volunteers to persevere through extreme conditions, to provide customary face-to-face assistance with dignity, and to reassure survivors that their basic needs will be met and they will be able to put their lives back together. A Vincentian, in her Katrina report to the National Council, said it best: “It’s been crazy, because I haven’t had a day off. I went from working two days to working two weeks straight, but it’s all for a good reason, a good cause. We are going the extra mile to see they get what they need!” (*Response to Katrina*, p. 13).

Vincentians have been practicing these fundamental principles for centuries. They meet face-to-face with those in need, exploring how to best address every need. Vincentians also strive to grow spiritually, always moving toward holiness, much like Frederic Ozanam and Vincent de Paul approached their own works. This approach is the SVdP's distinguishing feature among disaster-relief workers. Vincentians are known for working until the job is done—regular people called to perform extraordinary tasks.

“Why are you working over the forty hours required by FEMA?” a FEMA employee asked a Vincentian. SVdP executive director Liz Disco Shearer answered, “Vincentians work the 40 hours as requested by FEMA, but also donate another 30 hours to help with God’s work.”

A recipient said later, “God’s love was shown to me through you. God’s word said, ‘When I was hungry, you fed me. When I was naked, you clothed me.’ As for me, when I needed you to listen, you were there. When I needed a hug, you were there. When I needed you to care, you gave all you had. My family wants to say thank you from the bottom of our hearts, to you and the Society of St. Vincent de Paul” (*Response to Katrina*, p. 121).

Questions for Discussion

1. Vincent “loved to use this succinct motto: *Totum opus nostrum in operatione consistit* (Action is our entire task)” (Pujo, 251). What were one or two key actions of the SVdP after Katrina that illustrate Vincent’s motto?
2. What are one or two key ways our organization can be more action-focused in the manner of Vincent de Paul? What about in our own lives?
3. What is our normal response time with clients? What about in emergencies? How do we rise to the challenge?