

CATHOLIC COMMUNITY PROFESSIONAL
ASSISTANCE PROGRAM

SENIOR ALUMNI BOARD INITIATIVE

PRESENTED AT WINTER MEETING

JANUARY 2007

REV 4/10/09

Catholic Community Professional Assistance Program

BACKGROUND

After consultation, with many community service organizations, it was determined that there was a more pressing need for professional guidance and expertise than for hands-on volunteer assistance. This was not because either activity was more important than the other, but that there was a paucity of professional assistance relative to hands-on volunteers that work in soup kitchens, clothing drives, fund raising, home visitation, etc. It was also determined in discussions with a cross section of alumni that they indicated a strong desire to utilize their acquired business and professional skills, which they had developed through education and experience.

This close convergence of needs for catholic community service groups and alumni desires offered a unique opportunity not heretofore explored. Internal discussions with a core planning group further determined that while professional services could be offered to a variety of non-profit organizations, first priority would be provided to the local Catholic Community.

The Catholic Community is defined but not limited to, Diocesan Administrative offices, individual Parishes and schools, High Schools, Mission Parishes, and individual or all components of Catholic Charities, Seminaries and orders of Religious.

This approach provides an easy transition as many alumni already have personal relationships with clergy and diocesan staff at local parishes or community organizations. It also promises potential benefits to local Alumni Clubs as it offers the opportunity for increased involvement/membership through a unique program, positive publicity in the community and more active participation by older alumni who often become less involved as years go by. In addition to answering specific needs, services are provided gratis so receiving organization can potentially save significant monies by not having to hire outside professionals.

PROGRAM DESCRIPTION – There are two options available to your club to institute this initiative. Option 1 is to develop your skill base of volunteers and then meet with the Entity.

Option 2 is to first meet with the Entity and then develop your skill base.

Option 1:

1. First survey local alumni in the club area to determine level of program interest, time availability, skill expertise, etc. (See Appendices A & B). Stress that NDSA is a part of the local alumni club's community service efforts and is not a separate group in competition with other activities of the Club.
2. The next step is to prepare a matrix of volunteer capabilities (See Appendix C). Then meet with local catholic community leaders and other area charitable organizations and offer free professional services (strategic planning, legal,

accounting, public relations, tax, marketing, etc.) and identify needs and associated timing and content requirements.

3. With specific knowledge of these requirements, review database of volunteers and match their expertise with requested assistance.
4. Through personal contact (direct or telephone) speak with the matched volunteers, identify the service organization, explain the project requirements and secure agreement to participate. **Importantly, mention that no volunteer will work alone because a team of alumni (ae) will be assigned to every project.**
5. Next schedule a meeting with the alumni (ae) volunteer team and the requesting organization to explore the project more fully, allow the participants to get to know one another and outline a timetable for progress reviews and projected completion.
6. Lastly, conduct periodic reviews with volunteers to share experiences, discuss areas of concern, and offer suggestions to resolve issues.

Option 2:

1. Meet with local Catholic Community leaders and other area charitable organizations and explain the concept of the Program and identify needs and associated timing and content requirements.
2. Based on the results of the meeting, go to step 1 of option 1 and build your volunteer skill base. Eliminate the reference to a meeting in step 2 of option 1.
3. Follow steps 3-6 of Option 1.

ORGANIZATION REQUIREMENTS

To broaden the planning base, spread workload and help insure availability (coverage of meetings and accessibility to volunteers) it is strongly recommended that the NDSA program be chaired by at least two people for larger Alumni Clubs. Smaller clubs can utilize one chair effectively, or combine resources with other Alumni Clubs in close proximity to work together to offer more services than could be provided by acting alone. The responsibilities of the chair (s) are to plan and coordinate activities of the alumni volunteers and liaison with Catholic Community leaders, other community service organizations and alumni volunteers, but not be directly involved in service projects. It is of even greater importance that projects be handled by no fewer than two people and possibly more depending on the complexity and duration of the project. This is critical so that each member has someone else to work with, and to fill in when the other member is unavailable through travel, scheduling conflicts or whatever. This has proven to be an essential element because no one likes to work alone.

If possible, particularly for retirees who have an extensive travel schedule, it is preferable that each volunteer project be neither a scheduled repetitive commitment (e.g., one evening every week) nor a long-term commitment. Successful projects for volunteers are ones that consist of a one-time concentrated effort that extend for a couple of weeks or months.

IMPLEMENTATION DETAILS

At the outset, it needs to be acknowledged that many non-profit organizations are not as responsive regarding timeliness as most business professionals are accustomed to experiencing. Knowing this beforehand can reduce frustrations and help to understand that lack of quick

response is not necessarily indicative of disinterest. Much of this is due to overwhelming workloads.

Typical Catholic Community leaders to contact and invite to an initial exploratory meeting to explain the NDSA service program might include the Diocesan Chancellor, Director of Education, Director of Christian Services, Director of Parishes, Director of Finance, Director of Administration, and Seminary Administrative Director, Director of Catholic Charities, Pastors of local Parishes, Superintendent of Schools, (if applicable). Titles and organization structure will vary by Entity, but that can be determined by examining organization charts or conversing with administrative personnel.

Examples of typical assignments might include:

- Strategic Business plans for Elementary and High Schools
- General assistance regarding legal advice, tax help, accounting or bookkeeping principles, etc.
- General business advice such as marketing fundamentals, negotiation tactics, construction oversight, contract principles, budgeting, facilities management, public relations, hiring/firing/compensation legalities, conflict resolution, etc.
- Student mentoring and tutoring.
- Seminars on business principles and management practices for seminarians and recently ordained priests.
- Analysis of data bases for diocese demographics and change trends.
- Personal advice to clergy, deacons, and nuns regarding personal financial strategies and estate planning.

Other projects might include tax assistance programs (T.A.P.), determining access to federal and state assistance programs, preparing grant applications, architectural assistance, conducting fund raising workshops, holding media handling seminars, etc. The full gamut of potential projects is only limited by the skill sets available from the volunteer pool. Obviously, there will be occasions where a match between requestor needs and volunteer capabilities is not possible, particularly in smaller alumni clubs. A follow-up alumni volunteer solicitation letter may be successful in finding qualified volunteers (See Appendix D). If none are found, a courteous decline of the requested assistance will be necessary.

It might also be desirable, although not necessary, to survey the alumni volunteers regarding their experience with their projects after their completion and to provide survey feedback (See Appendix E).

NDSA contact: George Koch 248 623 0973
Or email: wanderers1@juno.com

The Diocese of Detroit who is currently benefiting from this initiative by the Notre Dame Club of Detroit has agreed to be a reference. Please contact the following individuals:

Monsignor Robert McClory, Chancellor

1234 Washington Boulevard, Detroit, MI 48226-1825 or phone 313-237-5847.

Mr. Michael Trueman, Assistant Chancellor
1234 Washington Boulevard Detroit, MI 48226-1825 or phone 313-237-5788

Monsignor Michael LeFevre, Director – Office for Priestly Life and Ministry
Cathedral Place
9844 Woodward Place, Detroit, MI 48202-1309 or phone 313-865-6300

ATTACHMENTS

Appendix A - Sample alumni solicitation letter (Page 6)

Appendix B - Sample volunteer survey (Page 7)

Appendix C - Sample matrix of alumni volunteers and their professional
Expertise (Page 8)

Appendix D - Sample follow-up solicitation letter (Page 9)

Appendix E – Sample volunteer satisfaction survey (Page 10,11)

NOTRE DAME CLUB OF _____

Dear Member,

The Notre Dame Club of _____ is organizing its Notre Dame Senior Alumni (NDSA) to launch a new community service effort. The program will primarily involve alumni (ae) retirees, but is open to all alumni (ae) whether retired or working and spouses.

_____ Club NDSA has decided to concentrate its efforts on providing professional assistance (strategic planning, legal, tax, accounting, etc.) to any metro area charity that would seek our assistance, with priority given to the local Catholic Community and organizations. This direction was reached by NDSA after consultation with many charities in the diocese that indicated a more pressing need for professional guidance than for hands-on volunteer assistance such as soup kitchens, food distributions, etc. We believe alumni (ae) club members can uniquely meet this need because of our educational training and work experience.

In general, most individual projects will require neither a scheduled commitment (e.g., one evening every week) nor a long-term commitment. Rather, the project will consist of a one-time concentrated effort over a couple of weeks or months. It is believed that these timing requirements will also more closely follow alumni (ae) time availability.

Specific examples include:

- Elementary and High School strategic business plans.
- _____ non profit has received federal grant money to assist homeless in becoming self-sufficient by starting a new business. They need marketing help, office requirements, equipment needs, human resources, etc.
- Several organizations (like the Missionaries of Charity-Sister Theresa, or your personal club community service organizations) could use tax assistance for the needy (applying for earned income credits, etc.), general legal advice, bookkeeping, etc.
- Seminars for newly ordained priests on hiring/firing, public relations, conflict resolution and other management practices.

_____ name and _____ name have jointly agreed to chair and coordinate this initiative by selecting projects and then securing other alumni (ae) to provide the necessary support. The _____ Club needs many volunteers with varied background and skills that are willing to assist on a “one-shot” project basis or as a continuing resource. In this regard, we request that you reflect on the good fortune and blessings you have, and strongly consider taking time to help through your professional career expertise.

If you are interested in helping, fill out the attached questionnaire and send to the address below by _____ date. We will hold a meeting after your inputs have been received to review potential projects. This meeting will be held _____ date at _____ place at _____ time.

Chairperson Name _____
Address _____
Telephone _____
email _____

Chairperson Name _____ -
Address _____
Telephone _____
email _____

Yours in Notre Dame,
NDSA Committee

Attachment B

NOTRE DAME ALUMNI CLUB OF _____
Community Service Survey

1. Do you currently perform volunteer community service work? Yes _____ No_____

2. If yes, what type of work do you do and how often? _____

3. Would you be interested in performing volunteer work with other ND alumni (ae)?
Yes _____No_____

4. If yes, we are organizing a group of alumni (ae) volunteers who will provide free professional services to non-profit organizations as a team and on a project basis. Would you be interested in participating with this group? Yes_____No_____

5. What type of assistance would you be interested in providing? Check all that apply.

- | | |
|-----------------------|-------------------------|
| Marketing _____ | Legal _____ |
| Accounting _____ | Advertising _____ |
| Mentoring _____ | Engineering _____ |
| Taxes _____ | Business Planning _____ |
| Management _____ | Computer Systems_____ |
| Tutoring _____ | Sales Training _____ |
| Estate Planning _____ | |
| Other _____ | |

6. Please list any of your time availability restrictions (e.g., spend winters out of state, not available on Tuesdays, etc.). _____

7. Provide any additional information or comments you believe pertinent. _____

Name _____ email _____

Home phone _____ Work _____ Fax _____

Address _____

City/State _____ Zip _____

Send to: Name
Address
Email

Attachment C

<u>Name- Address- Phone #</u>	<u>Legal</u>	<u>Acct</u>	<u>Tut</u>	<u>Men</u>	<u>TAP</u>	<u>Mgmt</u>	<u>Mkng</u>	<u>Adv</u>	<u>Eng</u>	<u>Busn</u>	<u>C.S.</u>	<u>Hlth</u>	<u>Sales</u>
Volunteer A						X			X				
Volunteer B	X			X	X								
Volunteer C						X	X			X			
Volunteer D			X		X								
Volunteer E						X	X	X					X
Volunteer F			X	X							X		
Volunteer G												X	

NOTRE DAME CLUB OF _____

Fellow Notre Dame Alumni/Alumnae,

The Notre Dame Senior Alumni (NDSA) has been established in the Notre Dame Club of _____. The purpose of this letter is to review our operating guidelines, enumerate our current active projects and, most importantly, urgently request new volunteers to staff additional projects requested of our group that we have not yet been able to fulfill due to lack of sufficient volunteers.

Regarding our specific local organization, we have decided to concentrate our efforts on providing professional services (legal, accounting, business, communications, tax, etc.) based on our education background and work experience, primarily to the _____ **secondarily** to other non-profit organizations in the area.

We do not engage in fund raising activities and act basically as advisors, not implementers. We concentrate on projects that do not require a scheduled commitment (e.g., every Tuesday) or a long-term involvement in order to be responsive to individual volunteer availability and timetables. We also assign at least two alumni/ae to each project so no has “to go it alone” and so that one project member is usually available.

Current projects include:

-
-
-

The diocese has identified future projects that will require new volunteers:

-
-
-

Our NDSA efforts are becoming more known in the area, and more organization are calling on us to assist them. We will certainly like to respond to all these needs, but we need more volunteers to be able to do so. There is enough variety in these requests that some are only one-shot actions, others only short term efforts and a few longer-term commitments. We would like to hear from you regarding your willingness to volunteer.

Very Truly Yours,

Attachment E

Below is a survey of our volunteers to generate feedback on our mission and activities since our start-up. Accordingly, it would be much appreciated if you would take a few minutes to complete and then return the following survey. We thank you for responding and we will take your responses seriously by adjusting our programs to maximize involvement and satisfaction. Please return to Name, Address, Fax and Email.

1. Do you agree with the focus of our efforts, which is to provide professional services to the Catholic Community and other organizations? Yes_____ No_____
- If no, what activities do you believe would be more appropriate (e.g., helping soup kitchens, clothing drives, etc.)? _____
-

2. How would you rate (1 being lowest and 10 being highest) the appropriateness for NDSA and value to providers of the projects with which we are currently involved.
- :

Fill in a number from 1 to 10
 Appropriateness Value

Elementary and High School Business Planning	_____	_____
Elementary and High School Student Mentoring	_____	_____
Seminary Business Lectures	_____	_____
Tax Assistance Program	_____	_____
_____ Parish Organization	_____	_____
_____ Parish Organization	_____	_____
_____ Parish Organization	_____	_____
Diocesan Data Analysis	_____	_____

3. How would you rate (also on a 1 to 10 scale) Rating
- The frequency of NDSA communications _____
- The adequacy of the communications content _____
- The frequency of NDSA group meetings _____
- The location of NDSA group meetings _____
- The organization of NDSA co-coordinators _____

- The effectiveness of NDSA co-coordinators _____
4. How would you rate (on a 1 to 10 scale)
 The time requirements of your project (s) _____
- The acceptance of NDSA volunteers by the assisted
 Organization _____
- The responsiveness of the assisted organization to NDSA _____
- The personal satisfaction you receive from your effort _____
5. Looking back on your project experience, would you volunteer for the same project?
 Yes _____ No _____
6. If no, why not? _____
7. If no, would you volunteer for a different NDSA project? Yes _____ No _____
8. If no, why not? _____
9. What actions would you recommend (if any) to improve your individual project?
- By NDSA coordinators _____
- By the diocese _____
10. Please provide any additional comments you wish to make _____
