



April 2005

Development Directions

A free resource for pastors, principals, development directors, volunteers and anyone engaged in the ministry of Catholic development.

Advancing Your Catholic Development Effort:

"What Should I Be Doing in Year 5, Year 7, Year 10 and Beyond?"

Here at ISPD, we find that development efforts in Catholic schools and parishes usually get started in one of four ways:

1. There is a strong need to bring in more money and so the development office will be set up, a person hired, and the emphasis will be on conducting fund-raising events, involving alumni, launching an annual fund, churning out a quarterly newsletter, building the database, and concentrating on strengthening the image so as to attract more students and parishioners.
2. The parish and/or the school will hire someone who has experience, and that person will come in and "hit the ground running." Besides all of the above, the office will also concentrate on professional growth, possibly a capital campaign, engaging people, building an endowment, and setting up a planned giving effort.
3. The parish and/or the school has a strong need to launch a capital campaign to raise 7-figure money, and after going through that intensive process for 12-18 months, the establishment of a development office with a development director becomes a natural next step.
4. In order to get things set up correctly, and hire the right person, the parish and/or school will engage a consulting company to come in for 8-12 months and lay the ground work by setting up the following components:
 - o Conducting an assessment of some kind to see where the institution is with their development effort;
 - o Forming a core group of people to lead the effort;
 - o Concentrating on educating all "internal publics" (staff, boards, parish and school leaders, etc.) on what development is and is not;
 - o Setting up the "avenues, roadways and vehicles" to invite and involve people on a consistent, regular basis throughout the year (input sessions, interviews, planning sessions, cup of coffee meetings, surveys and questionnaires, committees, boards, principal and pastor cabinets, convocations, etc.);
 - o Creating a written strategic plan to follow for the first 2-3 years by inviting 50-100 people to planning sessions;
 - o Conducting a fund-raising "audit" to make sure that all fund-raising efforts are under control;
 - o Making sure that the database is being formed correctly, and that all

"publics" of the parish/school are receiving a "people-oriented" publication at least four times per year;

- o Beginning to set up the organizational structure of a comprehensive Annual Fund;
- o Identifying who the financial leaders are in the parish and/or school and how best to relate;
- o Developing strong outreach program to the media, feeder sources, the neighborhood, and key businesses.

Naturally, there are other ways that Catholic institutions have begun, but the above four seem to fit a lot of situations.

Over the past 10-15 years, a lot of people have become more and more familiar with Catholic development. Many come into this ministry and stay to realize the many rewards of working with people and developing resources. Others stay for a few years and move on, not quite sure of what to do after the initial thrust is over. Plus, many of these folks are measured by, "How much money have you raised?"

Here at ISPD, we have had the pleasure of working with some really wonderful people who truly understand the meaning of the words Catholic development. Many have been in their ministry for 5-10 years and longer. They are the true "anchors" because they continue to do four things:

1. Concentrate on inviting, involving and engaging people - 24/7/365;
2. Advance their horizons by attending professional development workshops, seminars and conferences as well as staying abreast of the latest reading and on-line educational offerings;
3. Zero in on what the most important areas of concentration are by following a written strategic plan for their development efforts (formal or informal);
4. Not take the attitude that because they have been at it for a number of years, they "know it all" and there is not too much left to learn.

These folks represent this ministry well and continue to be an inspiration to all of us who know them.

Focus Areas for Long-Term Development Efforts

What then should a development effort be concentrating on after Year 5 or Year 7 or Year 10 and beyond? Obviously, this is going to vary from institution to institution; however, here at ISPD we believe there are 16 key areas to recognize.

1. Consistently educate the changing personnel at your school and/or parish.
 - Pastors, principals, faculty members, parish staff members, Core Team, board and council members, parents - all of these folks come in, stay a while and then move on.
 - It is important to have an annual or semi-annual educational session for all new key people in order to educate them on what the development efforts are doing.
2. Maintain a Core Team to work with you implementing the day-to-day initiatives of your development operation.

- Set up your Core Team of 15-18 people with a 1-2-3 year rotation, where every year you have 5-6 going off and 5-6 coming on board.
 - As your development efforts grow, it will be important to delegate and let others work with you. You cannot do it all!
- 3. Always pay attention to your "feeder system" of people.
 - This is probably the most important. You must have a "feeder system" set up in order to reach the second, third and fourth ripples of people.
 - Without this system, your development engine will run out of gas and you will find that you keep going to the same people all the time in order to get something done.
- 4. "Refresh" your strategic plan for development every 18 months.
 - The beautiful thing about a "fluid" strategic plan is that it can be refreshed every 18 months. New people need to offer input, and new challenges need to be presented.
 - This is a wonderful way to initiate the 60%-40% rule of inviting 40% of the people who are already involved, and 60% of the people who have not gotten engaged to help you refresh your old plan.
- 5. Continue to build relationships with your financial leaders.
 - Your list of financial leaders should keep growing by 10-20 every year.
 - It will be important to personally stay in touch with these folks at least seven times per year, and make two of those times personal meetings.
- 6. Establish and build your school and/or parish endowment fund.
 - Now with your development efforts underway, a lot of your financial leadership work can be devoted to building the endowment fund.
 - The endowment can be easily tied into your planned giving effort.
- 7. Launch a capital campaign every ten years.
 - The University of Notre Dame gave out that piece of advice years ago, and it does make sense. Done correctly, a capital campaign energizes, unites and ignites a community.
 - Consider devoting a percentage of the campaign to endowment growth.
- 8. Set up and build a planned giving effort.
 - Setting up the Planned Giving Council to establish mission, guidelines and literature is the first step.
 - Tie this into the financial leadership component, the capital campaign and the endowment growth.
- 9. Identify the "pillars of strength" and continue to build on them.
 - Annual Fund
 - Total Stewardship
 - Quality fund-raising events
 - New parishioner welcome
 - Public relations and marketing
 - Database building
 - Quality communication efforts (paper, people, electronic, etc.)
 - Alumni efforts
- 10. Become a "lightning rod" for networking and encouraging other development efforts throughout your diocese.
 - Now that you have the experience, it would be great to serve as a catalyst for future development efforts.
 - We always encourage development directors and those who understand the true meaning of Catholic development to spread

- the word to others.
11. Continue to build a vibrant memorial gift program.
 - There are many people in your parish and/or school who want to have the opportunity to make a memorial gift. It is up to the development office to set this up.
 - A nice brochure listing all of the opportunities and ways to make it happen would be helpful.
 12. Divide and conquer (neighborhood communities, alumni class agents).
 - With so many alums and so many parishioners, consider the wisdom of dividing your parish and/or school into smaller units and then recruiting people to head up those areas.
 - Start out by trying 3-5 areas and run that as a "pilot program," then move on to others.
 13. Continue to build your website to function in an interactive manner.
 - The web site will continue to be a major way of communications. We encourage you to set this up so as to allow interactivity. Register new parishioners; allow new families to request materials; explore the many ways of making this come alive.
 - Appoint/hire someone to make the day to day and week to week changes in order to keep your website fresh and relevant.
 14. Encourage on-line giving.
 - As we reported in our last newsletter, look into this way of giving. Although minimal at this time, over the next 10 years, this should prove to be a major way to generate funds.
 - Find out more by going to: www.catholiconline.org, and then clicking on "Catholic Financial Services."
 15. Set up a comprehensive phone outreach effort.
 - Why aren't you calling your parishioners or alumni 4-5 days/nights a week? Why not set up 4-6 phone lines, develop a Phone Outreach Ministry or Alumni Calling Club and talk to "your people."
 - It does not have to be a "money ask." You can simply call them and invite them to something going on at the school or parish.
 16. Coordinate a comprehensive e-mail system.
 - Although laborious at times, this is a wonderful way to communicate - with all of your key constituents. Think if you had all parish families who had e-mail addresses, and how easy it would be to send out a message.
 - Note how effective it would be to segment your alums from the '60's and send them a message of importance.

There are many ways to advance your Catholic development efforts. The key is making sure you work from a plan. Hopefully, some of the above thoughts will help keep you on track.

UPCOMING 2005 WORKSHOPS

Dynamic presenters share proven strategies and discuss development issues during one and two day seminars for Catholic parishes and schools. These workshops are conveniently held across the country at an affordable price of \$49-\$99 We hope you'll join us soon!

Topics Include: ** Attracting New Students ** Total Stewardship ** Long-Range Planning ** Annual Funds & Capital Campaigns ** Charge Up Your Development Battery! ** Building A Stronger Image of Your Catholic School ** Involving More People in Your Catholic Institution **

Scheduled Locations: ** Brooklyn, NY ** Chicago, IL ** Cincinnati, OH ** Cleveland, OH ** Columbus, OH ** Cullman, AL ** Denver, CO ** Detroit, MI ** Dubuque, IA ** Erie, PA ** Harrisburg, PA ** Hartford, CT ** Lacrosse, WI ** Mercerville, NJ ** Miami, FL ** Naperville, IL ** Newark, NJ ** Omaha, NE ** Orlando, FL ** Philadelphia, PA ** Pittsburgh, PA ** San Francisco, CA **

Tentative Dates are posted with site information pending.

- [Check Here for Details](#)

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