



April 2006

Development Directions

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

WHAT DO WE MEAN BY "CASE STATEMENT"?

Back in the early days of Catholic school and parish development, there was a lot of talk about the words "case statement." We still hear the words today, but not at the same level of intensity as we did back in the 80's and early 90's. In fact, major Catholic conventions – NCEA, NCDC, and the National Stewardship Conference - always had speakers who expounded on the value of having a "case statement." Over the last 10-15 years, we haven't seen a lot of "case statements" floating around, mainly because that drum has not been beaten too loudly. Let's see if we can beat on it a little bit today.

The case statement is an important document for any Catholic institution to have. Oftentimes, it is an internal piece, but many parts of it can be used in brochures, welcoming materials, campaign literature, videos, newsletters, etc. Let's define it: The case statement is a multi-page document that explains where your parish and/or school came from (your history); the unique qualities you possess; your present programs, ministries, and activities; where you are planning to go in the future (your vision), and why people should "invest" in you and your direction. The first page of the case statement is usually your mission statement which serves as the reason for your existence – your constant purpose for being.

Usually, the case statement finds its roots in the development office or from the administration, mainly because these are the folks who should be out in the community talking, marketing, selling, inviting, telling, and getting excited about what is going on in their Catholic school or parish. They need to all be on the "same page" and the case statement puts them there. These people are usually the ones who outline it and create it; they are the ones who put it into the hands of the parish staff, the faculty and staff, the Parish Council, the school board, the student council, the PTO board, and other leadership groups. By creating a case statement, the leaders of the parish and/or school are saying, "Let's get on the same page and get all of the messengers to speak the same message." It works.

Specifically, what should be in a case statement? In this newsletter, we present an outline we have used many times, and have also seen parishes and schools use this same one. Just remember: A case statement articulates where you have come from, where you are, where you are headed, and why people should invest in you.

CASE STATEMENT OUTLINE

- **Who Are We?** (Current picture)
 - Who are we? Why do we exist? (Mission and Goals)
 - What do we do that cannot be done better by others? (Uniqueness)
 - Whom do we serve? (Macro and Micro)
 - Who provides the service? (Leaders, staff, administrator, governing boards)
- **Where Have We Been?** (The past provides meaningful context)
 - Pertinent historical facts (founders, years of service, etc.)
 - Changes (program, location, facilities, service providers, costs, etc.)
 - Accomplishments (Key ministries, successful test scores, awards, graduates, model programs, etc.)
 - Service to the Community (stable force in neighborhood, economic impact)
- **Where Are We Going?** (Vision for the future)
 - Opportunities for our highest purpose (The best we can be)
 - How do we get there? (What changes need to be made?)
 - What do we need to make the changes? (Personnel, facilities, equipment, outreach, etc.)
- **Why We Need You** (Invest in our future)
 - Resources needed and why
 - Who can help? (Potential stewards)
 - How you can help us make a difference.
 - Specific ways people can help? (Ways of giving)

As we stated above, the case statement is an important document as a parish and/or school moves forward with a vibrant development effort. By putting this document together, it almost forces us to concentrate on those things that we need to emphasize – our mission, our culture, our uniqueness, our distinguishing characteristics, and our need for people. We do invite you to explore this topic more closely, because you never know when that prospective new family, financial leader or new parishioner is going to look at you and say, “Please state your case.”

ARCHBISHOP ALTER HIGH SCHOOL and SAINT SCHOLASTICA ACADEMY Development Success Stories

It is always a pleasure to work with Catholic institutions who “get it” when it comes to doing development correctly. Pure Catholic development takes a lot of time and a lot of effort, and it is easy to take short cuts and try to do everything by e-mail, “snail mail” or the telephone.

Two of the high schools our company is presently working with – Archbishop Alter High in Dayton, Ohio and Saint Scholastica Academy (SSA) in Covington, Louisiana – “get it.” Alter High School has launched a Long-Range, Strategic Planning process whereby they are examining nine areas:

- Spiritual Life
- Student Life
- Faculty and Staff
- Academics
- Athletics
- Technology

- Administration and Finance
- Development and Marketing
- Buildings and Grounds

SSA has launched a planning process whereby they are creating a written "advancement plan" for their development and marketing efforts.

One of the first steps in any planning process when we work with a parish and/or school is to form what we call the "Core Team." This is a group of 15-18 people who work alongside the development director, the principal, the consultants, and any other leaders. They are the "steering wheel" to the process. They are hand-selected and personally invited.

Both SSA and Alter High School followed these steps:

- They identified their top 25 candidates – their very best leaders.
- They created a bullet point sheet outlining what they were going to ask these folks to do, how often they would, and what the overall expectations would be.
- The pastor, principal, president, and/or development director made every call and personally met with many of these people.
- They went over the bullet point sheet with these leaders.
- They explained why it was important that they strongly consider serving on the Core Team and how valuable this group would be to the development efforts.
- They followed up within a few days if they did not get an immediate answer.
- They thanked them profusely when they accepted the invitation.
- They published their names so people could see this was an excellent group of parish and/or school leaders.

On Monday, March 27th, all 16 members of the SSA Core Team helped lead the opening meeting of their planning process. They were also instrumental in personally inviting the Development Advancement Team – the large group of 50+ people who will help create the draft plan to advance the development and marketing efforts of the school.

At Archbishop Alter High School in Dayton, the president, Father Jim Manning, personally invited every member of the Core Team and all the chairs of the nine planning areas. Out of 40+ people, only one told him "no" and that was because of having to take care of a family member who was ill.

People will become involved in our Catholic institutions if we will only reach out and extend a personal invitation and engage them in a meaningful relationship.

SPRING 2006 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-\$149

We hope you'll join us soon!

Topics Include: ** Strategic Plan for Development for Parishes & Schools **

** Total Stewardship ** Annual Funds & Capital Campaigns **
 ** Charge Up Your Development Battery! **

Scheduled Locations: ** Atlantic City, NJ ** Chicago, IL ** Denver, CO **

** Las Vegas, NV ** Louisville, KY ** Nashville, TN ** New Orleans, LA **
** Pittsburgh, PA ** San Francisco, CA ** Sante Fe, NM **

- [Check Here for Details](#)

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Please feel free to forward this newsletter to anyone you think could benefit from this information. If there are any topics you would like to see covered in a future newsletter, please contact us.

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