



April 2008

Development Directions

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

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"THE PARISH & SCHOOL ANNUAL FUND: A COLLABORATIVE EFFORT"

By Frank Donaldson, President

Before we jump into the importance of a collaborative effort with a parish and school joining forces to conduct an Annual Fund, let's start by distinguishing between Fund-Raising \$\$\$ and Development \$\$\$. Now, you may be saying, "What is he talking about?" Fund-Raising is fund-raising. Not really. Please hear me out.

There's a Difference Between Fund-Raising \$\$\$ & Development \$\$\$

Here at ISPD, we state that there is a difference between Fund-Raising \$\$\$ and Development \$\$\$. The first is a "buy and sell" mentality. There is nothing wrong with this, but it usually means that a Catholic school or parish is going to sell you something and you are going to buy it. Some examples, although not all, are candy drives, raffle calendar sales, Christmas wrapping paper sales, Bingo cards, Christmas trees, car washes, walk-a-thons, bike-a-thons, Fairs and Festivals, and the list goes on. When I buy a Bingo card, I am not interested in the school's mission, vision, goals and plans for the future. I simply want my Bingo card so I can win at Bingo. When I buy two bars of Heath candy from my next door neighbor's daughter, I only want the candy. I am not concerned if that school will be open next year or not. Buy and sell. The main key to this way of thinking is making sure that your Fund-Raising events do three things, if possible:

- Surface new leadership
- Build community
- Raise good net dollars

The main thing not to do with your Fund-Raising events is "nickel and dime" people to death. Two-three good parish and/or school sponsored Fund-Raising events are always good to help balance the budget.

Development \$\$\$ is an entirely different mindset. When people consider giving this way, there is usually nothing expected in return. In most cases, this is pure philanthropic giving, or as some would say - living the life of a true steward. No strings are attached, no expectations, no list of stipulations in order to get the financial support. Usually, with Development \$\$\$, there is a strong belief in the leadership, the mission, the goals, the values, the plans for the future, and relationship building has been at the heart of it all. The main examples of Development \$\$\$ efforts are the Annual Fund, the Capital Campaign, Endowment Giving, Planned Gifts, Memorial Giving, and Special Project Funding. Most of the time, these gifts are invited "eyeball to eyeball."

For a Catholic Institution, the Annual Fund is the Single Most Important Development \$\$\$ Effort

With the above in mind, let's look at the next point. The Annual Fund, we believe at ISPD, is the single most important Development \$\$\$ effort that a Catholic institution can embark upon. Why? Because, many times, this is the first time that donors and prospective donors are being invited to give without getting anything in return. Pure giving in order to advance the cause, the mission, and the future of that Catholic school, parish and/or diocese.

For years now, many Catholic schools have been running annual funds. Many of them are direct mail appeals; others have a phone outreach attached to them; others also include major gift invitations. One area, here at ISPD, that we have promoted and also see as being successful is when the Catholic school AND the parish join together and launch an annual fund together - putting forth a unified front with very specific case points that benefit, equally, the parish and the school.

Here are some tenets to success in launching a Parish and School Annual Fund.

- The derivation for this kind of Annual Fund should grow out of the desire of the pastor and principal to work together in a collaborative manner.
- Just as we detailed in our May 2006 ISPD Newsletter on *The World Class Annual Fund* ([click here to read the article](#)), there needs to be different divisions of this one.
 - Major Gift Division
 - Leadership Gift Division (Parish Council; School Board; School administration, faculty and staff; parish staff)
 - Education Gift Division (Religious Education parents and School parents)
 - Parish Gift Division (all parishioners not in any of the above divisions)
 - Friends Gift Division (maternal and paternal grandparents, school alumni, and friends of the parish and school - all of whom who are not present parishioners or parents)
 - Business Community Division
- The leadership for this Annual Fund should come from BOTH the school and the parish with 3-4 Operational Chairs and 2 Division Chairs for each division.
- The case points for this Annual Fund (where the money goes) should be equally divided between the parish and the school so everyone can see the equal benefit for both. It is also helpful to have 3-4 items specifically identified on where the money is going, and possibly, have one of those items something that BOTH the parish and school will benefit from.
- This Annual Fund should not be confused with Stewardship of Offering or with school tuition. This Annual Fund's purpose is to generate support for those items that usually are not fundable in the parish and/or school's operational budget. This needs to be positioned as "pro-active" giving and not "re-active" giving.
- This Annual Fund should be organized NOW - in the spring. It should be launched in

August or September and the invitation needs to be extended in any number of ways:

- One on One invitations
 - Home receptions
 - Pulpit presentations
 - Parish and/or school receptions
 - Direct mail with phone outreach
- This Annual Fund should invite three gifts - Gifts of Prayer, Gifts of Involvement and Gifts of Financial Participation.
 - Gifts to this Annual Fund should run through June 30th.
 - Proper Annual Fund literature should be created and organized:
 - Annual Fund brochure
 - Intention card
 - Personal letter from pastor and principal
 - Return envelope for the intention card
 - Annual Fund stationery
 - This Annual Fund should carry a theme that reflects unity and collaboration between the parish and the school.
 - The pastor and the principal, along with the 3-4 Annual Fund Chairs, need to be the main spokespersons for this Annual Fund.
 - The number of people participating should be just as important as the amount of dollars that are pledged and/or given.

As you can see, the Parish and School Annual Fund is a wonderful way to build closer relationships and to bring forth a united front. Here at ISPD, we have seen this work with any number of configurations including a regional school with feeder parishes. There is a lot to be said for joining forces and sharing resources rather than just trying to go it alone.

ISPD OFFERS FREE SERVICE: A Place for You to Announce Job Openings in Catholic Development, Advancement and Total Stewardship

ISPD now offers a free service to any Catholic parish, school or diocese. We have a new button on our website entitled ***Development Job Postings***. By clicking on this button, visitors can go directly to this page and view job announcements and opportunities from area Catholic institutions. Twice per month in our two newsletters, ISPD will mention this opportunity and invite readers to view these announcements. These newsletters reach over 6,500 Catholic leaders by e-mail each month.

Each announcement should be no more than 200 words and should invite people to submit a resume to your specific address (e-mail or physical). We ask that you mail new requests (with the announcement attached in a Microsoft Word document) to ISPD@aol.com, including the name of your contact person and a telephone number where we can reach you, just in case we need clarification on the announcement. Announcements will be put in alphabetical order by institution. This month there are seven Catholic institutions that will begin this new service.

- [Click here to read more about these job opportunities in Catholic development](#)



ISPD 15 MIN Educational DVDs on Catholic Development Free upon Request

Beginning this month, ISPD will introduce a new educational DVD each month on Catholic Development topics. Listed here are those topics and the month they will be released.

- ***An Introduction to Long-Range Planning for Catholic Parishes***
(available now)
- ***An Introduction to Long-Range, Strategic Planning for Catholic Schools***
(15 May 2008)
- ***An Introduction to ISPD's Total Stewardship Process***
(June 2008)
- ***Creating the Strategic Plan for Development for Parishes and Schools***
(August 2008)
- ***Inviting, Involving, and Engaging More People into the Life of Your Catholic Parish***
(September 2008)
- ***Getting Ready for a Capital Campaign, Part I***
(October 2008)
- ***Implementing a Capital Campaign, Part II***
(November 2008)

To receive your free 15 minute DVD, please visit the [Resource Center](#) on our website.



CATHOLIC SCHOOL ENROLLMENT TALK

ISPD is your Catholic School Enrollment Solution for maintaining and/or increasing the quantity, quality, or diversity of your elementary or secondary Catholic school enrollment. *Catholic School Enrollment Talk* is our free monthly online newsletter for anyone interested in Catholic school enrollment solutions.

- [Subscribe today!](#)



SPRING 2008 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 \$69-\$250 .

We hope you'll join us!

Topics Include:

- ** Become a More Welcoming, Engaging & Affirming Catholic Parish **
- ** Best First Steps to Take in Beginning Your Catholic Development Efforts **
 - ** Capital Campaigns That Produce Results **
- ** Catholic School Enrollment Solutions - One and Two Day Seminars **
 - ** Charge Up Your Development Battery **
 - ** Customer Service in Your Catholic School **
 - ** Long Range Planning **
 - ** Total Stewardship **

ISPD Also Conducts On-Site Workshops

Offered to Catholic schools and parishes within a single diocese, these workshops are designed to meet your specific needs.

- [Check Here for More Information on ISPD Development Workshops](#)

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The Institute of School and Parish Development (ISPD) is a national, Catholic development consulting firm created to serve Catholic schools, parishes and dioceses in the areas of planning, marketing, fund-raising, and resource development.

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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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