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Development Directions

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

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15 Common Catholic Development Mistakes (with questions raised on how to avoid them)

By Frank Donaldson, President

Background and Rationale

The title of this newsletter is "*15 Common Catholic Development Mistakes.*" Before we go any further, there needs to be some clarification on the word "mistakes." With this newsletter, we are referring to those areas of Catholic development that ISPD sees as taking the wrong turn or making the incorrect approach. We feel sure there could be argument on both sides with some of these "mistakes"; however, we are electing to zero in on those areas that we deem incorrect in both philosophy and action.

For example, over a year ago ISPD was invited to make a presentation along with three other consulting companies, to a Catholic parish and school who wanted to embark upon a capital campaign to raise \$3,000,000 to build a new multi-purpose building. We presented our "Traffic Light Process", a proven method of approaching a capital campaign from a development stance rather than just a fund-raising stance. We stressed building support through input sessions; having a long-range plan in place (not just for the facilities but in all areas); having a Steering Committee trained and ready; publishing a Q&A Booklet to explain what is going on; conducting a parish-wide survey at every Mass to determine attitudes; integrating a strong prayer component to the process; hosting a Parish Convocation to talk about vision and not just facilities; inviting 100 new people to the development effort each year, and so on. This parish had done some "pipe-lining" to their parish families, but only in the area of facilities - not vision, mission, ministry planning, or prayer.

They elected to go with another company who would conduct the feasibility study within 30-45 days and begin the fund-raising within 60-90 days. Unfortunately, they did not see the wisdom of taking a "development" approach to building their parish for the future. They simply wanted the money for the multi-purpose building. The end.

To ISPD, that approach was (and is) a mistake. We feel that there are certain steps you need to take in getting a parish ready for a capital campaign. Some of those steps were missed. Also, and probably the most important of all, there is a fantastic opportunity available in using a parish capital campaign as the springboard into future development of the parish and school - in all areas. Plus, a capital campaign is a wonderful time to evangelize and get to know so many new people. Many parishes miss out in not taking a development approach and they simply want to "get the money." We call that approach a mistake. Are there arguments on both sides? Sure. We have our belief set, and there are others who have their own.

Interestingly, that same parish that sought to raise \$3.0 million did raise around \$2.1 million, and when the campaign was over, they did not have any of the following in place:

- New parish leaders
- New parish development office and officer
- New parish families who felt part of the faith community
- Renewed energy for parish ministries
- Identifiable planned giving prospects
- Written strategic plan for parish development for the next 3-5 years
- Major donor process
- Increased Total Stewardship process
- New vision for the future

Therefore, this newsletter is created to expose the fifteen most common mistakes, and we should probably add, "*that ISPD sees as being incorrect in philosophy and approach.*"

1. Development efforts are launched and the leadership of the parish and/or school does not understand the difference between Development vs. Fund-raising.

Questions to ask to overcome the mistake:

- What education and training is available for the pastor and/or the principal to understand and learn what Catholic Development is about?
- What in-service has been provided to the faculty, the staff, the board, and parent and parish leaders on the true meaning of Catholic Development?
- Why did parish/school leaders want to first establish a Catholic Development effort?
- Are there pastors and/or principals in the diocese who do understand development? If so, would they be willing to come and speak with your pastor and/or principal?
- Do parish and school leaders understand ISPD's 7 I philosophy?
 - Identify-inform-invite-involve-implement-invest -improve
- How Catholic are the development efforts?

2. Too many development directors are hired to primarily run fund-raisers for the parish and/or the school.

Questions to ask to overcome the mistake:

- Is there a Master Plan for Fund-raisers in place that details the following:
 - The number of fund-raisers presently being done
 - The amount of money expected
 - The amount of net dollars raised in the past
 - The amount of people it takes to organize and implement the fund-raiser
 - The number of hours the fund-raiser takes to organize and implement
 - The specific "audiences" who are asked to support the fund-raiser
 - The amount of money each "audience" spent in the past
 - The time of year
- Does the parish/school leadership understand the difference between Fund-raising \$\$\$ and Development \$\$\$?
- Is there an application process in place for all groups, clubs, organizations, etc. to

apply for permission to conduct a fund-raiser?

- Is there a clear job description in place for the development director so there is an equal balance of time?

3. The development director's salary is determined solely by the amount of money raised.

Questions to ask to overcome the mistake:

- How much education have parish and school leaders had on what to expect from a development effort?
- How clear is the job description of the development director?
- What outcomes have been determined for the first year? The second year? The third year? The fourth year? The fifth year?
- Do most parish/school leaders understand that a true development effort takes 3-5 years to grow and mature?

4. There is no written Strategic Plan for Development in place.

Questions to ask to overcome the mistake:

- Is a plan going to be created (with many constituent groups) that will guide the day-to-day efforts of the development efforts?
- Is the plan going to address the many areas of Catholic development:
 - Public relations
 - Planned Giving
 - Marketing
 - Grant writing
 - Publications
 - Memorial giving
 - Alumni
 - Communications
 - Annual Giving
 - Fund-raising events
 - Total Stewardship
 - Long-Range Planning
 - Capital Campaign
 - Major donors
 - Endowment
 - People Engagement
 - Enrollment Management
 - Total Stewardship
- Is there someone who will be able to facilitate a planning process that will create a written Strategic Plan for Development?

5. The people in charge of the development effort have very little support and few training opportunities in order to grow and improve.

Questions to ask to overcome the mistake:

- What services does the diocese offer in regards to monitoring and training?
- Are there reputable workshops in your area and beyond that you can go to and learn more about Catholic development?
- What kinds of resources are you assembling in your development library?
- Do the people working in development in your diocese get together (formally or informally) to simply talk about what is working and what is not working?
- Does your parish/school leadership see the value of using an experienced

consultant to educate and train?

6. **The development effort is not built around a strong "people fuel" component - one where 100 new people are invited every year to get involved in some meaningful manner.**

Questions to ask to overcome the mistake:

- What are we doing to address the first "I": IDENTIFY? Are we constantly adding to a list the names of people who can make a difference?
- Do the leaders understand the importance of "empowering the laity?"
- Are there good and clear processes set up for people to become involved?
- Are all invitations to people made personally?
- Is the pastor/principal the one to issue the invitation?

7. **When people are invited to form the Steering Committee, a Planning Team, or some development committee, ISPD's 60/40% rule is not used. (60% of the people invited are new to involvement; 40% are already involved)**

Questions to ask to overcome the mistake:

- What process is in place to identify the 60% "new" people to your Catholic institution on a regular basis?
- Is prayer used in discerning over which people to invite to which group or team?
- Do all development leaders understand the meaning of the 60/40% rule?
- Do all development leaders understand that this 60/40% rule is key to the success of the development efforts?

8. **Campaign goals should not be determined by dividing the amount of money to be raised by the number of donors available.**

Questions to ask to overcome the mistake:

- Do development leaders understand that many campaigns operate out of a 30-30-30 split?
 - The first 30% of the money usually comes from 10-15 financial leaders.
 - The second 30% of the money usually comes from the next 100-200+ people.
 - The last 30% comes from everyone else.
- If your parish/school is going to launch a campaign, has a feasibility study been conducted?
- Has a donor pyramid been constructed for the campaign?
- Have parish/school leaders actually spoken to the financial leaders?

9. **Parishes/schools launch into a capital campaign without taking the proper steps to build people support and establish a strong development stance.**

Questions to ask to overcome the mistake:

- Does the parish/school have a long-range strategic plan in place for all areas - not just facilities?
- Who made the decision to do what is going to be done?
- Does the campaign tie into the mission and vision of the institution?
- Is there confidence in the leadership?
- Has there been excellent communication to all "publics"?
- Has there been successful annual giving?
- Is the infrastructure for development in place?

10. **Parish and school leaders do not understand the juxtaposition of the fund-raising**

events to annual giving to capital giving to endowed giving to planned giving.

Questions to ask to overcome the mistake:

- Are the parish/school fund-raisers carefully planned and strategically scheduled so as not to interfere with other development \$\$\$ efforts?
- Is there a strong Annual Fund effort in place?
- Is a capital campaign seen as essential every ten years?
- What money is used to "fuel" the endowment efforts?
- Is there an organized planned giving process in place?

11. Parish/school leaders do not understand that the Annual Fund Drive is the single most important Development \$\$\$ effort that could ever be done.

Questions to ask to overcome the mistake:

- Are the dollar goals for the annual fund realistic or based solely on budget projections?
- Is there a 15-20% increase in the number of donors from year to year in the annual fund?
- What is the attrition rate in the annual fund over the past five years?
- Are parish/school fund-raisers "stepping on the toes" of the annual fund year after year?
- Is the annual fund evaluated each year by the "customers" who support it?
- Is there an Annual Report each year of what is done with the money?
- Are you inviting the three gifts: Prayer, Involvement and Financial Participation?

12. Direct mail is seen as the main "tool" for inviting people to invest in the future of the parish/school.

Questions to ask to overcome the mistake:

- Do parish/school leaders understand that direct mail should be used for three major things:
 - Introduce and announce
 - Position
 - ReinforceBut never to "close the deal".
- Is there an "eyeball to eyeball" method for inviting people to participate?
- Do parish/school leaders understand that there are six major ways of inviting participation:
 - One-on-one
 - Home reception
 - Receptions at parish/school
 - Receptions at neutral site
 - Phone Outreach
 - Envelope insert into parish/school newsletter

13. The pastor and the principal do not have to get directly involved in the development efforts.

Questions to ask to overcome the mistake:

- What is the role of the pastor and/or the principal in the development efforts at your institution?
- Do the pastor and/or the principal see development as a nuisance or a necessity?
- Do they build into their schedule a regular meeting time with the development leaders of the parish/school?
- Will the pastor/principal sit down one-on-one and invite the gifts?

- Have the pastor and principal been trained properly on what development is and what it is not?

14. The parish staff and the school faculty and staff are not seen as being key players in the development process.

Questions to ask to overcome the mistake:

- Do parish and school leaders understand that the parish staff and the school faculty and staff are very important "customers" to the development effort? They are the ones who live out the mission every day.
- What communication vehicles are in place to invite and involve them?
- Do any of the staff serve as members of the Core Team or on a planning team?
- Do staff members have the opportunity to ask questions and give input?
- Do the development leaders ask what needs the staff may have?

15. There is no Core Team to help "steer" the day to day development activities of the parish/school.

Questions to ask to overcome the mistake:

- Who is in charge of the development efforts?
- Is this a one-person show or are there shared responsibilities?
- Does the development director try and do everything by himself/herself?
- Are there 15-18 members of a Core Team?
- Have they been trained?
- Does the Core Team work side by side with the development director?
- If there is no development director, is there a Core Team member who is in charge?

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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.

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

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