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Development Directions

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

ROLE OF THE PASTOR AND PRINCIPAL IN DEVELOPMENT: SUGGESTIONS FOR SUCCESS: PART II

Background and Rationale

In the July issue of "Development Directions" we published Part I of this article with Suggestions #1-13. If you did not receive the July newsletter, please visit our website or e-mail Frank Donaldson, ISPD president, at ispd@aol.com, and he will be happy to send you Part I. This August issue is Part II.

Suggestion # 14: The pastor/principal should learn to effectively ask for money.

- There are different ways of asking for the gift. The pastor/principal should learn how.
- The bottom line in inviting a family/person to financially participate is that the pastor/principal should have certain things lined up in order to be really effective:
 - A compelling case statement
 - A open relationship with the family/person
 - A desire to really invite their participation into the life of the parish/school
 - A genuine understanding that the "invitation" should be done by simply inviting someone to consider an amount, to pray and discern over that decision, and to participate at a level that is comfortable for them.
 - An understanding that the range of the gift must be suggested and not "Do what you can do."
 - The desire to build an on-going relationship by continuing to engage the family/person in the future.

Suggestion # 15: The Pastor/Principal should seek to fund the development efforts with creative funding sources.

- To set up a development office, hire a development director, retain the services of a consultant, equip the office, and run it with efficiency require a financial investment. Many times, principals/pastors look to the operational

budget. While that may be a source, it does not have to be the only source. Here are some other areas:

- Underwritten by a donor or donors
- Percentage of Annual Fund designated to continuation of development efforts
- Grants specifically "earmarked" for development
- Gifts in kind for office equipment such as office furniture, fax machine, telephone, copier, computer, file cabinets, etc.
- Fund- raising efforts help fuel the expenses
- Funding from more affluent parishes/schools or diocese
- School and business partnerships

Suggestion # 16: The pastor/principal should answer some key questions about their leadership style.

- The questions that need to be answered, personally, and through much prayer and discernment are:
 - Is my leadership style going to be "boss" management or "team" management?
 - Am I willing to spend money to make money?
 - Am I a process thinker or a program thinker?
 - Am I in a situation where people think in a proactive manner or a reactive manner?
 - Am I always looking for the Win-Win situation with everyone?
 - Am I interested in development because of the money or because of the people and relationships?
- These are direct questions that need strong consideration and thoughtful answers in order for development efforts to flourish.

Suggestion # 17: Pastor/Principal should understand the main components of Catholic development.

- In order for development to come alive in the parish/school, there are certain components that must be in place. These components make up the heart of the development effort. They are:
 - Articulation of mission and vision
 - Internal and external communication
 - Public Relations and publications
 - Annual Giving (School)
 - Strategic planning
 - Engagement of people
 - Total Stewardship (Parish)
 - Database organization and management
 - Fund-raising events
 - Alumni (School)
 - Capital Campaign
 - Endowment growth
 - Planned Giving
 - Memorial Giving
 - Grant Writing

Suggestion # 18: The Pastor/Principal should understand the effectiveness levels between direct mail, e-mail, the telephone, and person-to-person communication.

- As a leader in a Catholic institution, one of the easiest things to do is fire off a memo, write a generic letter, do a group e- mail, or call someone on the

phone. Many times, these are the only ways that time allows.

- It will be important to know, however, the level of effectiveness in these methods of communication.
- If the pastor/principal wants to maximize the effectiveness of a message, here is the break down:
 - Direct mail will result in 5- 8% maximum effectiveness.
 - E-mail will result in 8-12% maximum effectiveness.
 - The telephone will result in 15-18% maximum effectiveness.
 - Person-to-person will result in 45-55% maximum effectiveness.
- The math is easy to do.

Suggestion # 19: The Pastor/Principal should have an Advisory Council.

- There are many excellent people in our parishes and schools who simply do not have the time to serve on a committee, work on a long project or take a lot of time out of their schedule. We want them involved; they want to be involved, but we have not found the right avenue for that to happen.
- Many pastors and principals see the value of having an Advisory Council meet 2-4 times per year for breakfast or lunch or dinner and offer advice on a wide range of important topics.
- This Advisory Council could be 20-30 people – influential and affluent – who can certainly provide a wonderful perspective. They cannot offer hours every week or month, but they can come to a 90 minute luncheon. It is best to send them the questions that need thought and reflection one week before the meeting.
- The pastor/principal does the inviting – personally, along with preparing the agenda and running the meeting. After all, these folks are there for the pastor/principal.

Suggestion #20: The Pastor/Principal should disclose the financial status of the parish/school on a regular basis.

- Whether this is done monthly, quarterly, semi-annually, or annually, financial disclosure is important to any Catholic institution. When parishes and schools demonstrate that they are being good stewards of the money entrusted to them, then more and more people will want to get involved. It is a matter of credibility, trust and stewardship.

Suggestion # 21: The Pastor/Principal should always expect the “cold north wind.”

- Leaders are going to be “shot at.” It comes with the territory. The main problem is does bring is that too much negative can destroy creativity and ingenuity.
- There are two “rules” that ISPD recommends to Catholic leaders:
 - If the pastor/principal is hearing negative (not simple concern) from more than 5-10% of the constituent base, then attention needs to be paid. One-on-one meetings, listening sessions, written explanations, and small group gatherings in homes need to be put in place to determine the root of the dissent.
 - If less that 5-10% negative, apply the following rule:
 - Listen – record – move on.

Suggestion # 22: The Pastor/Principal should become familiar with the key words of team management.

- The main leadership style that is very effective in Catholic institutions is team management. Lay leaders encounter this in the corporate world, in their work place, and in the business aisles of most book stores.
- There are a number of wonderful resources available, and by simply browsing through a WaldenBooks, B. Dalton, or a Barnes and Noble bookstore, pastors and principals can come to better understand the language that deals with the following areas:
 - Engagement
 - "Customer" Service
 - Change process
 - Quality Management

Suggestion # 23: The Pastor/Principal should concentrate on the first I of the 7I process.

- Through all of ISPD's literature, we refer to the 7 I's:
 - Identify
 - Inform
 - Invite
 - Involve
 - Implement
 - Invest
 - Improve
- The pastor/principal should concentrate on the first I and make this the number one priority on a day to day basis. The ability to constantly *identify the people who can make a difference* is a real skill and a worthwhile endeavor.
- Every day we meet people who can make a difference in our parish/school, and unless we are ready for that encounter, they can slip by unnoticed.

Suggestion # 24: The Pastor/Principal should concentrate on Annual Giving and Major Gifts.

- Whether a school or a parish, the ability of the development office to organize an effective and efficient annual giving process, will be key to the success of the money side of development. On the parish side, this would be the Stewardship of Finance Campaign, and on the school side, this would be the Annual Appeal.
- The pastor/principal should also be in tune with the financial leaders in the parish/school. They should be engaged in some manner, and the emphasis should be on building that relationship. Most financial leaders are outstanding citizens, stewards, and leaders in the community.

Suggestion # 25: The Pastor/Principal should measure success by the expansion of the people base.

- To invite and involve (engage) 100 new people each year in a meaningful manner to a parish/school is indeed an accomplishment.
- To see a 10-20% expansion in the number of people who give on an annual basis is indeed an accomplishment.
- To personally find 10 people each year who can make a positive, profound impact on a parish/school is indeed an accomplishment.
- It is all about engaging people, having excellent processes, and realize that we all should be about building the Kingdom of God.

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