



CATHOLIC SCHOOL DEVELOPMENT: *Separating the Fact from the Fiction*

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INTRODUCTION

One of the major challenges Catholic school leaders face is educating their key internal publics (faculty, staff, parents, students, board leaders, alumni) on the meaning of the word *development*. Closely associated with that is the constant struggle to have Catholic school leaders understand that development is a process and not a program that is plugged in at various times when money is needed. Too often we have heard the nightmare stories of a development director hired and then fired within 6 months because all the school really wanted was a full-time fund-raiser to run the fair, the festival, the auction, the bingo, the golf tournament, or the calendar raffle. And, because the administration and school board did not understand development, everything was judged on the amount of money raised.

Here at ISPD, we define development as *the meaningful involvement of people in your mission and vision for the future*.

By the very definition of the word, *development* takes time — usually 2-4 years — before a Catholic school will begin to see substantial results. School leaders must be willing to invest money in order to make money.

We have searched for ways to educate and inform Catholic school leaders of the development process, and over the years, we have developed an approach to teaching and in-servicing.

We call this approach: *The 7 Is of the Catholic Development Process*.

- **Identify:** To continually identify the people, processes, values and goals that become key to development success
- **Inform:** To reach out to all publics (parents, alumni, past parents, parishioners, grandparents, businesses, the overall community, feeder sources, etc.) and inform them of the development process and the “bragging points” of your Catholic school
- **Invite:** To have the above publics take a closer look at you and you at them — usually through invitation vehicles such as input sessions, surveys, interviews, cup of coffee meetings, questionnaires, listening sessions, etc.
- **Involve:** To meaningfully involve people in the development processes such as strategic planning, annual fund leadership, marketing council, case statement committee, and other listed in this document
- **Implement:** To implement the plans, the strategies and programs that have been created through the involvement of people
- **Invest:** To invite people to invest in the future of your Catholic school by seeing themselves as true “stewards” of that school
- **Improve:** To set up development processes that will always improve through a Total Quality approach

It is essential to understand that the 7 Is refer not only to people but also to processes. So, please do not think that with the first I — *identify* — that we are talking just about identification of people with money. This is not a program approach where everything is in a neat little box; this is looking at development in terms of a system of inter-related parts that all must function together in order for the entire system to be successful.

Also, this is not a process that will take place in one year, or two, or three. Based upon the last I — *improve* — it will be necessary to take a Total Quality approach to the development process and realize that we are talking about a continual improvement cycle. Every year you will prioritize what is important for your Catholic school at that time and concentrate on implementing the key pieces in that stage of the 7 I cycle. Let’s look at an overview.

I. Identify

This stage is key because at this level you must *identify* some key elements:

- Why does your school need a development effort?
- What are the differences between this approach to development and a fund-raising effort?
- What is your mission?
- What is your vision for the future?

The *Identify* stage also challenges a Catholic school to *identify* some key information:

- What is working well in development?
- What is not working well?
- What are the ten “Brag Points” you would use in bragging about your school?
- Who are the key internal leaders?
- Who are the key external leaders?
- Where is quality evident in your school?

This stage also seeks input so you can *identify* how your various publics feel and think about you. Many schools conduct:

- Image surveys
- Attitudinal surveys
- Interest surveys
- SWOT analysis (strengths, weaknesses, opportunities, threats)

As a Catholic school seeks its true identity, it is also time to start *identifying* the many fund-raisers you are doing and begin to develop a Master Plan for fund-raising so you don't keep the “nickel and dime” approach all the time.

In the larger picture, it is essential in the *Identify* stage to decide on the long-range planning process that your school will use to create a dynamic vision for the future.

And, obviously, this is the stage where the database begins to take shape by having at your fingertips the key publics with whom you will need to communicate.

II. Inform

While the school is working with the first stage, and once the key message is in place (mission, vision, brag points), it will be important to begin to *inform* people. Please keep in mind that these seven stages are in constant motion — with processes always cycling. One does not end and another one begins.

With the *inform* stage, you must *inform* your constituency — those on the database — of your mission and vision.

This is also the time to in-service and *inform* your key internal publics on your development process and where you are going with it and why they need to be involved. Some of those key publics are:

- Administration
- Boards
- Faculty/Staff
- Student leaders
- Parent leaders
- Parish leaders
- Alumni leaders

Obviously, this is the stage to begin to put together the key information pieces — realizing that you will change and amend as your process continues. Some of those key pieces are:

- “Brag” sheet
- “All Publics” newsletter
- Welcome information
- Profile Sheet
- Recruiting materials
- News releases

III. Invite

While you continue to identify and inform, you also begin to *invite* people to find out more about you and also — in this stage — for you to find out a great deal about them, and their ideas and thoughts.

Although a seemingly simple stage, the *Invite* Stage is crucial, because many times this is the door that is being opened for someone. Several key *invite* strategies are:

- Input sessions
- One-on-One visits
- Surveys and interviews
- Open House
- Cup of coffee meetings

There must be avenues for you to *invite* people before they are ready to get involved.

IV. Involve

Clearly, the most important stage in the development process, *involvement* is the key to success. Through meaningful *involvement* comes ownership and engagement and the sense of belonging. That will lead to life-long relationships.

Some key *involvement* processes are:

- The Development Core Team
 - ▲ 12-15 people who steer the development process with the principal
- The Boards (School, Directors, Trustees)
- Development Advisory Board
 - ▲ The group of 60-80 people who help create the Strategic Plan for Development
- Alumni Board
 - ▲ The group of 10-15 who help organize alumni activities
- Annual Fund Cabinet
 - ▲ The 15-20 leaders who help organize and run the Annual Fund
- Long-Range, Strategic Plan Central Task Force
 - ▲ The 18-20 people who steer the school's long-range planning process
- Long-Range, Strategic Plan Convocation
 - ▲ The 200+ people who are invited to a two-day Convocation in order to offer strategic ideas about the school's future
- Parent Ambassador Team
 - ▲ A group of 10-20 parents who help promote the school
- Student Ambassador Team
 - ▲ A group of 10-20 students who help promote the school

- Public Relations Committee
 - ^ A group of 5-10 key publics with an affinity for the school who help organize and oversee the public relations and publications efforts. These people are experts in communication, public relations, journalism, and desktop publishing.
- Fund-raising Committee
 - ^ A group of 5-10 people who help organize and implement the major fund-raisers for the school
- Grant Writing Committee
 - ^ A committee of 5-10 people who research, organize, write and apply for grants for the school

This is also the stage where you may need to *involve* a development director in the process. The key is to set this up to succeed and not fail. Several key reasons on why now is a good time to *involve* the development director:

- Key school leaders should know the difference between development and fund-raising — by now.
- The mission should be clear.
- There should be a written plan in place for that person to implement.
- A lot of key people have gotten involved who want to see this process succeed.

V. Implement

Through the creation of plans and processes — many of which have been created through the involvement of people — now is the time to begin to *implement*. Two of the best plans that ISPD recommends are:

- The Strategic Plan for Development
 - ^ This is the plan that is created by the Development Advisory Board, refined by the Core Team, and *implemented* by the Core Team and the development director. This Plan concentrates solely on the development efforts and makes sure there is a written plan to follow.
- Long-Range, Strategic Plan for the School
 - ^ This is the plan that involves hundreds of people in creating prioritized strategies for the near future and the far future — in nine planning areas:
 - † Spiritual Life
 - † Academics

- † Athletics
- † Student Life
- † Faculty and Staff
- † Administration and Finance
- † Buildings and Grounds
- † Development
- † Technology

^ This plan begins with the Central Task Force and concludes with a two day Convocation with over 200 people on your campus helping you set the course of action for the next 5-10 years.

Both of the above processes tieback into the definition of development: *the meaningful involvement of people in your mission and vision for the future.*

VI. Invest

This is the most rewarding stage in the process. Here is where all the other five stages make sense, and when you are ready to invite these people to *invest* in the future of your Catholic school, many stand willing and able to make that *investment*. Why? Because they have been involved in the process and feel that sense of ownership. They have reached a level of consciousness where they see themselves as true stewards of that Catholic school.

The single most important step in the *Invest* Stage is the Annual Fund. Also called the Annual Appeal or the Annual Giving Drive, this process is key to development \$\$\$ success.

Other processes in the Invest Stage are:

- Major Donor Process
- The Capital Campaign
- Grant Writing
- Memorial Gift Process
- Endowment growth
- Planned Giving

VII. Improve

In our Total Quality work we often speak of the Process *Improvement* Cycle or the PDSA: Plan • Do • Study • Adjust. Every process, every year, every cycle must be viewed as continual and in motion — with the idea that there is always room for improvement.

With all the processes in development, we must always seek to refine, re-introduce, and re-do. As you move through the 7 Is, there will be some processes that will work well and others that will need jump-starting. As you move from one year to the next, you will find that time will be a great asset in terms of when you introduce various processes. In fact, each year, as you cycle through the 7 Is you will want to revamp and readjust, add and delete.

When we begin to view development as an *improvement* cycle that moves through process, then we have begun to really understand the key: people and processes will be the cornerstone for your success. And, when we reach the stage where we see all of this as ministry – building the Kingdom of God – then we will realize how important Catholic Development is to future of our Catholic institutions.

CONCLUSION

As anyone can see, Catholic school development is an exciting and dynamic process, when implemented correctly. For more information about ways to implement many of the above processes, please e-mail Frank Donaldson (ispd@aol.com) or visit ISPD's website: www.ispd.com.

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