



February 2007

Development Directions

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

"The Pastor/President/Principal Cabinet"

If we agree that *development is the meaningful involvement of people in your mission and vision for the future*, then our # 1 challenge in Catholic Development continues to be to "Open Wide the Doors to Christ." Or, to put it in language we use in our consulting and workshops, "Create the avenues, the roadways and the vehicles to engage people into the life of our faith community."

As many know, ISPD is all about people engagement – and enrollment. Based upon the Gallup Organization and their years of study in regards to what motivates an individual and/or family to become active in a church parish (or school), we know that *belonging leads to believing*. When people are personally invited to get involved in our parishes and Catholic schools, then they develop a strong sense of identity, ownership and belonging. This leads to folks seeing themselves as *stewards* of that Catholic parish and/or school. It is important to note that being a *steward* is actually a level of consciousness rather than the amount of a check written or an asset transferred. *True stewardship* has all to do with sharing the many gifts we have – prayer, involvement, finance, expertise and wisdom, connections and resources. Belonging is the first step.

There are many people in our parishes and schools who would really enjoy getting involved, but oftentimes they do not because of two reasons:

1. No one invites them personally
2. They simply do not have the time to serve on a committee, a board, a council, an implementation team, etc.

In many cases, these are busy women and men who travel or whose schedules do not allow for a long term commitment. They are bright, articulate, professional, and critical thinking people who make a difference in their community. *Please do not discount them*. There is an excellent way for them to get involved, and we call this the Advisory Cabinet. A pastor, president or principal can assemble one. Let's look at what their role could be.

The Advisory Cabinet is exactly what the name says – *advisory*. They are not a board; they do not form policy; members serve because they have a lot to bring to the table. They have expertise, talent, wisdom, resources, and connections. And, the beautiful part about this group of people is that they come together either two, three or four times per year – pending on how often you wish to meet. Most of the Cabinets we have worked with meet twice a year for lunch from 11:30 AM – 1:30 PM.

Every Catholic institution has people (parishioners, parents, alumni, business executives, alumni, grandparents, past parents, friends, neighbors, etc.) they would like to invite, but they have not found the time to extend the invitation or they have made up their minds that “so and so” is too busy. The Cabinet changes that way of thinking. Why? Properly invited, most everyone can give 2-3 hours of their time twice per year in order to offer advice and expertise to a Catholic parish and/or school where there is some connection.

There are a number of key points to the invitation:

1. The invite needs to be extended personally from the “honcho.”
2. You should invite 30-40 people to get the 25 that you will need.
3. The purpose needs to be clear:
 - o Come have lunch with the pastor
 - o Help solve 2-3 challenges that the parish and/or school is facing at this time.
4. Host this event at a place that is conducive to visiting, eating, listening and discussing.
5. Remember that the key to success is getting the right people to commit to this process. This is not a “Y’all come” meeting. The Cabinet is a carefully selected group of men and women – usually identified and invited by the pastor, president and/or principal.
6. Mail out the letter of invite, and include the agenda and the challenges you are going to ask them to help you solve. That way they know ahead of time what is expected.

One of the main focus points of the Cabinet luncheon is to help the pastor (or president or principal) solve 2–4 challenges that the parish is facing. These challenges could come from the pastor alone, or they could come from the parish staff, the Pastoral Council or some other leadership group. The important thing to remember about the challenges is that they be “hard-hitting” and somewhat difficult to solve. In other words, you really need this outside group to offer their “best wisdom.”

Sample challenges (on the parish level) we have seen are:

- How can we invite and involve more youth (ages 16-21) into the life of our parish?
- How can we become a warmer and more welcoming parish?
- How can we reach out and invite those 65% or more parish families who are not involved in the life of our parish?
- What are the best ways to retire this \$2.8 million debt we have here in the parish?

These challenges can provoke all kinds of discussion, and the best agenda we have seen goes like this:

- 11:30 AM
Introductions and Opening Prayer
- 11:45 AM – 12:30 PM
Lunch
- 12:30 PM – 1:30 PM
Cabinet Discussion

If you have three challenges and 60 minutes to solve them, then devote 15-20 minutes on each one. The pastor, president or principal should be the one who facilitates the discussion at the luncheon – if possible.

Great ideas will emerge. Someone from the staff should be there taking notes. What we usually find is that at 1:30 PM the discussion will have a tendency to keep on going, but please officially stop at 1:30 PM. 40% of the people present will remain and keep on sharing their ideas, and many will actually have a conversation with the pastor indicating personal ways that he/she can help. A lot of by-products come from meetings like this – new resources, new creativity, and new people involvement.

The Cabinet is a wonderful way to reach out and engage people who do not ordinarily become involved in the life of our Catholic institutions. We find that people say “YES” because it is not time consuming, they enjoy contributing, the Cabinet does reconnect them to the institution, and they enjoy sharing their ideas and expertise.

DIRECTOR OF DEVELOPMENT & STEWARDSHIP

The Job Description

Background & Explanation

In deciding when to bring on or expand the position of Director of Development and Stewardship, there are always a lot of questions to ask, such as:

- When is the right time to bring this person on board?
- What should the job description look like?
- Do we hire from within or go outside of our parish?
- What should be the focus areas for this person?
- How do we get the word out that we are looking for a director?
- How much do we pay?
- What kind of person are we looking for?

These, and more, are excellent questions to ponder. Our feature this month will be a comprehensive job description. By that, I mean, in the “perfect world” what would we want this person responsible for? One of the main traps is when a parish/school will hire this person, and over a period of time, the development and stewardship office becomes a “dumping ground” for everything that no one else wants to do. If development and stewardship are going to thrive, then we recommend that this person stick to the job description that is articulated.

Below is a sample outline. Please feel free to amend, edit and change. It does cover the main areas of a comprehensive effort.

Director of Development & Stewardship Job Description

- **Purpose of Position:**
To take a leadership role at the parish/school by implementing the development and stewardship activities, including development office management, Strategic Planning, Total Stewardship, financial resource development, student enrollment, and public relations/communications

- **Reports to:**
Pastor and Principal

- **Major Responsibilities:**
 - **In the area of development office management:**
 1. To maintain a development office and organize all development and stewardship activities
 2. To update and maintain donor/database records of all publics
 3. To actively work with:
 - The administration
 - Core Team
 - Parish Staff
 - School leadership
 - Pastoral Council
 - Alumni leaders
 - Parent leaders
 - Faculty and Staff
 - Parishioners

 - **In the area of development dollars:**
 1. Eventually, to conduct an Annual Fund that will include:
 - Parishioners
 - Parents
 - Alumni
 - Past parents
 - Faculty/Staff
 - Grandparents
 - Friends
 - Businesses
 - Corporations/Foundations
 2. To prepare and implement the direct solicitation program
 3. To oversee the research and writing of grant proposals to foundations and corporations
 4. To research individual and corporate sources of funding
 5. To set up and implement a Major Gift Process
 6. To set up and implement a Planned Giving Process

 - **In the area of public relations and communication:**
 1. To serve as the public relations agent for the parish/school
 2. To promote major parish/school events
 3. To oversee a quarterly newsletter that will go out to all publics
 4. To oversee an annual report
 5. To design and implement a marketing plan
 6. To design and implement a public relations plan
 7. To design a news release/media contact plan
 8. To become a member of key area civic organizations in the area
 9. To organize the new parishioner welcome program

- **In the area of special event fundraising:**
 1. To coordinate all special event fund-raisers
 2. To empower volunteers to participate fully in special events
 3. To prepare a Master Plan for all Development \$\$\$ and Fundraising \$\$\$
- **In the area of people involvement:**
 1. To follow the 7 I process of inviting and involving people in the mission and vision of the parish/school
 2. To organize a vibrant volunteer program for the ministries of the parish and the organizations of the school
 3. To set up an appreciation plan for all volunteers
- **In the area of student enrollment:**
 1. To plan, manage and conduct the Open House
 2. To prepare enrollment brochures and other materials
 3. To implement the enrollment plan to sustain and/or increase enrollment
- **In the area of Total Stewardship - Prayer, Ministry and Finance:**
 1. To plan, manage and implement the Total Stewardship Process
 - Timeline
 - Publications
 - Education & In-service
 - Special Events
 - Ministry Fair
 - Ministry Appreciation Dinner
 - Ministry volunteer organization
 - Annual Evaluation
 2. To identify, invite and involve the Total Stewardship Committee in the process
- **In the area of the Long-Range Planning:**
 1. To oversee the creation of the Long-Range Plan for the parish/school
 2. To assure that hundreds of people are invited to give input into the Plan
 3. To oversee the implementation of the Long-Range Plan
 4. To communicate the progress of the Long-Range Advancement Plan

SPRING 2007 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 soon!

Topics Include:

- ** Catholic School Enrollment Solutions **
- ** Capital Campaigns **
- ** Charge Up Your Development Battery! **
- ** Become a More Welcoming, Engaging & Affirming Catholic Parish **

** Best First Steps to Take in Beginning Your Catholic Development Efforts **

Spring Locations:

** Chicago ** Denver ** Houston ** Indianapolis ** Milwaukee **
Minneapolis **
** Nashville ** New Orleans ** Tampa ** Washington, DC **

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