



March 2007

Development Directions

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

"Key Steps in the Capital Campaign Process"

Throughout the country, more and more parishes and schools are taking on the task of organizing, launching and completing a capital campaign. Years ago, I once had a development professional who had been in the business for a number of years say to me, "A Catholic institution needs to launch a capital campaign every ten years whether they need it or not!" Now I realize that his statement was "tongue in cheek," but the meaning behind it is strong. Done correctly, a capital campaign can do a great deal to ignite, recharge and invigorate a Catholic community. A capital campaign almost forces a parish and/or school to look at a number of areas:

- Vision for the future
- Mission of why you do what you do
- Leadership
- Long-Range Planning
- Viable needs growing out of the planning
- The number of people engaged in the life of that Catholic institution
- Level of confidence and trust in the leaders
- Personnel

In addition to the above, there is another major question to be answered: Is the approach going to be "Go get the money," or is the approach and philosophy going to be to use the capital campaign as a wonderful way to engage people into the life of the parish and/or school. These are two different ways of thinking - one is short term and the other is long term.

In 2007, we are going to spend some time on this topic, simply because we find that 50% of the parishes and/or schools we come in contact with are either thinking about a campaign, starting a campaign, in the middle of a campaign, or finishing up a campaign.

In this issue, let's walk through the major steps we have found to be successful, and examine what separates a successful campaign from an unsuccessful campaign.

1. Have parish/school leaders decide if they are going to engage the services of

outside counsel to help organize and steer the parish/school through the campaign process.

2. Form the Steering Committee that will guide the process from beginning to end.
3. Have the parish/school leaders establish the major threads (i.e. what you are planning to raise money for - facilities, endowment, renovation, etc.) they want to "shop around."
4. Once major threads are decided upon, seek input from the various constituents that make up that parish/school.
5. Go to the sources that will provide the necessary demographic data that will support a future Site Master Plan.
 - o CACI American Demographics
 - o Chamber of Commerce
 - o Diocesan office
 - o Past studies, evaluations and accreditation processes
 - o Real estate agencies
 - o City, county, or parish planning commissions
 - o Baptismal records from feeder parishes
 - o Feeder school data
 - o Marketing studies conducted by area businesses, especially hospitals
6. Finalize the major threads (components) for a possible capital campaign.
7. Create, publish and distribute a Q&A Booklet. (These will be the answers to the questions you have been hearing through all of the input you have received).
8. Conduct a survey with input from at least 250 constituents in regards to the order of importance of the major threads.
9. Based upon survey results, create the Case Statement and/or the Position Statement for a possible Campaign.
10. Have outside counsel organize and conduct the Financial Feasibility Study.
11. Make the recommendation to move forward or not. If yes, then move to Campaign organization.
12. Get necessary approvals.
 - o Parish Council
 - o Boards
 - o Diocese
13. Set up the Campaign Organization and recruit key positions.
 - o Operational Chairs and Honorary Chairs
 - o Pacesetter Chairs: Special, Lead, Major and Leadership Division Chairs
 - o Public Chairs: Parish and Education (RE and School) Division Chairs
 - o Public Chairs: Friends and Business Community Division Chairs
 - o New Parishioner Gift Division Chairs
14. Set up database with key information, especially an e-mail system.
15. Continually educate the key Campaign leaders on their focus in the Campaign.
 - o Operational Chairs:

1. Recruit Division Leaders
 2. Share wisdom in key areas
 3. Organize and focus
 4. Help plan Pacesetter Phase
 5. Help plan Public Phase
 6. Secure gifts from Campaign leaders
- Honorary Chairs:
 1. Lend name to the Campaign
 2. Attend Pacesetter Reception
 3. Financially support
 4. Invite 1-3 people to financially participate
 - Pacesetter Chairs:
 1. Recruit teams
 2. Lead: Gold Medal Committee
 3. Major: Blue Ribbon Committee
 4. Leadership: Captains
 5. Get team members to the training
 6. Offer your best wisdom on key issues of the Campaign
 7. Help plan Pacesetter Reception
 8. Attend receptions
 9. Keep communication wide-open up and down the lines
 - Public: Parish Division/Education Division
 1. Recruit teams
 2. Parish: Geographic Captains/Parish Visitors
 3. Education: Grade Level Chairs/Class Captains
 4. Offer your best wisdom on key issues
 5. Attend Pacesetter Reception
 6. Invite \$\$\$ gift from team members
 7. Help organize Public Phase Kick-Off event
 8. Coordinate and attend parish/ed receptions when possible
 9. Maintain line-item accounting
 - Public: Friends Division
 1. Make decisions on school alumni
 2. Decide what role Grandparents will serve
 3. Build database
 - Public: Business Community Division
 1. Create case for support
 2. Identify businesses
 3. Select Captains
 4. Establish "connectors"
 5. Train division chairs and captains

16. Campaign leaders need to address some key issues to the Campaign.

- Money ranges suggested
- Gift giving divisions
- Naming opportunities
- Campaign materials
- Update Bulletins
- Campaign Messages

17. Establish Campaign Office.

- Development Director
- Physical space conducive for meeting and working
- Necessary equipment: computer, copy machine, fax machine, telephone line and # desk and chairs, work area, filing cabinets, secure files

Business Community.

19. Train all people in the Pacesetter divisions.
20. Create and finalize all Campaign materials.
 - o Campaign Prayer
 - o Pocket folder
 - o Case Statement/brochure
 - o Video
 - o Letter of Intent
 - o Q & A
 - o Fact Sheet
 - o Campaign Pyramid
 - o Payment Breakdown Sheet
 - o Campaign Stationery
21. Set up and implement Campaign Accounting and Communication.
22. Secure Campaign leaders' LOIs (Letters of Intent) before Pacesetter Reception.
 - o Steering Committee
 - o Operational Chairs
 - o Honorary Chairs
 - o Division leaders
 - o Gold Medal Committee
 - o Blue Ribbon Committee
 - o Leadership Captains
23. Host Pacesetter Reception.
24. Invite and secure Pacesetter LOIs.
25. Organize Public Gift Divisions.
26. Train teams in Public Gift Division.
 - o Parish: Geographic Captains and Parish Visitors
 - o Education: Grade Level Chairs and Class Captains
 - o Friends: Division Chairs
 - o Business Community: Captains
27. Implement the Public Gift Divisions.
 - o Home Receptions
 - o Parish Receptions (after Mass)
 - o One-on-One Visits
 - o In the neighborhood packet delivery
28. Complete all visits in all divisions.
29. Organize and implement wrap-up phase.
30. Celebrate success!
31. Phase into development.

Effective vs. Ineffective Capital Campaigns

After 18 years of working with Catholic capital campaigns throughout the country, ISPD recently evaluated the differences between effective campaigns and ineffective campaigns. Using a cross section of 22 campaigns, the points listed below proved consistent. As a learning tool, this chart can be used to forewarn as well as remind.

- [Download Campaign Chart](#)

ISPD Campaign Readiness Assessment

Thinking about a capital campaign for your parish and/or school?

Why not take advantage of ISPD's FREE Capital Campaign Readiness Assessment? This is a three step process:

1. Download and complete our [Discovery Form](#) which will provide answers to questions that are important for us to assess your readiness.
2. If you're ready, we will come to your site and meet with your leaders for 1-2 hours and discuss the Discovery Form.
3. That evening, we will present our findings to your parish and/or school leaders, go over what it takes to organize and run a successful campaign, and discuss ways we could be of service to you.

What would be the next steps if you are interested?

Please call us at 800-299-2393 or e-mail us at ispd@aol.com. We look forward to helping you assess your readiness.

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

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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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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