



May 2005

# *Development Directions*

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

## **CATHOLIC DEVELOPMENT: 10 KEY TENETS FOR SUCCESS**

### **I. Please understand "Catholic Development".**

- Many people working in Catholic institutions do not understand development as being *the meaningful involvement of people in your mission and vision for the future*. They see it as a way to generate more money. Period.
- Unfortunately, that approach - which may have moderate success the first year or so - is not going to be the one that donors will work with over a long period of time.
- "Let's hire a development director so we can get some money coming in here." That is the cry ISPD hears across the country from unknowing board members and even leaders of Catholic institutions. Therefore, the position of the development director, when hired for that purpose, is set up to accomplish one goal: raise money. Everything is then measured based upon that goal. And, that is why some development directors do not last more than 1-2 years. Pure development takes 3+ years to firmly establish.
- Where in the word *development* are the letters that say *fund-raising*? We do see the word *develop*, and that usually means you are going to take the following steps:
  1. Assess your present situation;
  2. Create/affirm the mission;
  3. Clarify and articulate your vision;
  4. Set up the goals to live out the mission and vision;
  5. Invite and involve people to build this vision with you by creating and implementing a long-range advancement plan;
  6. Continue to improve (develop) over a period of years by building on the many people relationships you have established and continue to establish.

### **II. Educate your inner circle.**

- If Roman Numeral I was an eye-opener, then you should see the value of making sure your Inner Circle is educated on what development is and what development is not. This will be crucial to your success. Without these folks knowing what to expect and what not to expect, the first 12 months could be

a lesson in futility.

- The people who need to understand development are:
  - The pastor
  - The principal
  - The parish staff
  - The faculty/staff
  - The Parish Council
  - The Finance Committee
  - The School Board
  - The Parent Leaders
  - The key Commission (Ministry) leaders
- This will not be a one time deal. It is highly recommended that you set up a monthly Development *Update* Bulletin and also plan to visit with the above folks on a regular basis - some more so than others.
- The advantage of having a development consultant do an in-service on development to the above people is a big plus. They can speak about this topic from an experienced level, and they do not have to worry about guarded kingdoms and hidden agendas.
- Education of these publics on a consistent basis will be in direct proportion to the success you will have as a development director. Please do not brush this aside.

### **III. Assemble a Core Team.**

- A development director, a principal, and/or a pastor cannot do it all. Essential to success is assembling a Core Team of 12-15 people who can work with you side by side. The Core Team comes from that inner circle group of "believers" - people whom you can always depend upon. These are usually parents, faculty, parishioners, key donors, and alumni.
- The focus of the Core Team is strategic; their goal is to help plan and then help implement. This is not an advisory group that sits in the backseat and offers opinions on various topics; this is an active group that rolls up their sleeves and makes things happen.
- They need to be trained. You cannot expect Core Team members to come in and know right away what to do. They need to know the following:
  - Their purpose and general goals
  - The rationale for their existence
  - How often they will meet
  - The way the development "office" is organized
  - What is meant by the word development
  - The 7 I's of Catholic development
  - The top 5-10 priorities for the next 6 months
  - Their specific roles - for example:
    - Entering data into a database
    - Designing a logo
    - Creating a quarterly newsletter
    - Informing internal leadership groups of what the development efforts are planning to do
    - Creating a Master Plan for all fund-raisers
    - Assembling a list of the top 100 people who can make a difference in your parish/school
- Core Team members usually agree to work with you for 6 months, 12 months, or 18 months. It is always great when you start the Core Team to try and get the distribution of time set up - for example:
  - 4 members for 18 months
  - 4 members for 12 months
  - 4 members for 6 months

#### **IV. Build your efforts around people and relationships.**

- Development is all about people - you are going to be able to develop your parish and/or school through the meaningful involvement of people. And yet, that is the most difficult thing to teach in this business of Catholic development.
- Yet, therein lies the difference - Catholic development. This is not non-profit development where money is the driving force for survival, and the window of opportunity is small and not very wide. In Catholic development, we should be concerned with building relationships; we should be concerned with building community; we should be concerned with building the Kingdom of God. Recently, a pastor friend of ours - when asked what his mission was as a pastor - said that his role was to walk hand in hand with his parishioners and spiritually guide them along the journey back to the Kingdom of God. If that is the role of our Catholic leaders - be they priest, principal, bishop, DRE, Catholic school teacher, or deacon - then it seems that the role of the development efforts for that parish/school is threefold:
  1. To gather as many people as possible to unite with that parish and/or that school;
  2. To continually invite those people and many others as the years go by to walk hand in hand - sharing a common vision - as we all journey back to Kingdom;
  3. To provide the necessary resources - through meaningfully involving people - to nourish the many people we gather along this journey.
- This view of Catholic development is vastly different than what you may hear at other workshops or with other consulting firms. Here at ISPD we believe in three words when we talk about development: people - process - ministry.
  1. Development is all about the meaningful involvement of **people**.
  2. Implementing development efforts greatly depends upon the quality of the **processes** you use.
  3. Development of our Catholic parishes and schools is indeed a **ministry** that seeks to build the Kingdom of God.
- People give to people - whether it be their time, their talent or their financial resources. The more we build our development efforts around people, the more resources we will then be able to generate. People know people who know people - once again, it is all about people.

#### **V. Re-charge your battery.**

- Catholic development "officers" quickly realize that their job is not 9-5. Those that approach the position with that mentality usually do not last that long. "Whatever it takes." This is the attitude that successful development directors usually adopt - quickly. There are night meetings, breakfast meetings, weekend events, Subway meals, and cups of coffee devoured as development directors try to juggle all the plates in this circus.
- Your life as a development "officer" is like a battery - it needs to stay charged. Once the charge goes down, then the energy goes down, and the ability to relate to people becomes less effective. Because a development "officer" does not go home at 5:00 PM, and weekend work is all part of the journey, it will be important for you to sit down with the pastor and/or the principal and plan your breaks.
- Development "officers" should be driven by the compass and not the clock.
- Keep your battery charged.

#### **VI. Think process and not program.**

- In the beginning days of ISPD we referred to development as a "program." This was incorrect thinking and terminology on our part. Through the years we

have learned that development is a process, and when people apply program thinking to it, the results can be less than desirable. Let us look at this more closely.

- A "program" is just that; it is "start and end" thinking. In Catholic schools, for example, there are always new programs for the year - a new humanities program, a new discipline program, a new enrichment program. On the parish level, there are other kinds of programs - a new stewardship program, a new parishioner welcome program, a new music for youth program. We always say that "program" thinking is short-sighted. It almost goes along with people who say that things like, "Oh, this is Sister's new program for this year. And, you know what? This too shall pass - like everything else."
- Not so when development is seen as a process. Actually, when a parish and/or a school formally begins the development process, it should never stop. There is always a beginning, and as long as that parish and/or school stays vibrant through the meaningful involvement of people, then development should continue for the life of the institution.
- With development, we work with processes that are always evolving, always improving, always seeking to invite and involve new resources. That is the value of process-thinking as opposed to program-thinking. Development does not plug in and then plug out; it does not get started and then fade away. Not when done correctly.
- For example, let's take a capital campaign. For those program-thinking people, a capital campaign is an excellent way to get an infusion of dollars in to the parish/school in order to build something that cannot be built with operational money. It is a fund-raising program.
- If we look at a capital campaign as a process, then some new things come to light.
  1. This approach requires a strong base of people to help organize, make decisions, go on visits, and invite the gifts.
  2. This approach is just as concerned with what happens years after the Campaign is over as what happens at the end of it. The relationships last a lifetime.
  3. This approach is built around people -- meaningfully involving them in the mission, the vision, the goals and the case of the institution.
  4. This approach is not pressuring, not coercing, not "hitting up someone" -- it is simply an honest, open invitation for people to invest in the future of the parish/school, and together with many other people, build a dynamic vision for the future.
  5. This approach provides a wonderful opportunity to build community and also to evangelize.

## **VII. Have a cup of coffee with your top 25.**

- Early on in the development efforts, the first "I" in the 7 I process must be understood and put into play - IDENTIFY.
- Identify the people who can make a difference. This is an on-going process, and certainly not a static list. Every hour, every day, every week, development officers, pastors, and principals need to be adding to that list.
- When a parish/school is first setting up shop, there is a "honeymoon" period that the new development "officer" has - usually 90-120 days. This is a wonderful time for that person to go, sit down, and have a cup of coffee with the Top 25 people who have made the most difference for that parish/school in the past 1-10 years. This is a wonderful way for the new person to learn more about the parish/school, and also an excellent way for these people to feel they are special - and they are.

## **VIII. Get ready for success.**

- At ISPD, we are great believers in attitude. In fact, it is one of the seven pillars of greatness in what separates a great Catholic parish/school from a good Catholic parish/school. The other pillars are:
  - Vision
  - Leadership
  - Quality
  - Communication
  - Creativity
  - TEAM approach
- When a development effort is in its infancy, you can expect to hear all kinds of comments. Some will be positive and encouraging, and some will be negative and doubting. With the latter voices, you need to realize one thing: they are just part of the landscape. This negative element could destroy you if you are not careful. These folks find something wrong with everything that happens in life, and here at ISPD we always say to do three things:
  1. Listen
  2. Record
  3. Move on
- Get ready for success! Establish some clear measurable goals for the first 90 days, accomplish these goals, and then communicate to all of your internal publics, that the first 90 days was successful. And, here is what you - and others - are planning to do in the next 90 days.
- Also, make sure that you are set up to succeed:
  - Do you have an office - one that is in close proximity to the parish/school?
  - Do you have a designated phone line?
  - Do you have a computer, printer, and modem?
  - Do you have a fax machine?
  - Do you have the necessary software? For example:
    - Microsoft Office (word processing, spreadsheet, presentation programs)
    - Pagemaker (page layout program)
    - File Maker Pro (database program)
  - Do you have internet access?
  - Do you have access to copy machines?
  - Do you have necessary supplies? (Stationery, envelopes, etc.)
  - Do you have necessary equipment? (Desks, working area, file cabinets, etc.)
  - Do you have privacy in the office and a secure locking system for electronic records and paper records?
  - Do you have a regular schedule set up to meet with the pastor/principal?
  - Are you on the calendar to give update reports at all of the key meetings of the parish/school? (Faculty meetings, parish staff meetings, parish council meetings, school board meetings, parent club meetings, etc.)
  - Do you have an area of your office or at the parish/school where you can meet with a key person and have a cup of coffee?
  - Do you have the facilities and means to offer a visitor some refreshments?
  - Do you have a credit card for the development office?
  - Is your salary and benefit package set up in a win-win situation with regular review and opportunity for advancement?
  - Are you and your superior clear about your working hours and what time parameters are expected of you?
  - Have you built in opportunities for professional advancement via workshops, seminars, conferences, etc.?
  - Have you scheduled your "down time"?
  - Do you have immediate and non-confrontational access to all

- parish/school giving history?
  - o Are you a member of the administrative team of the school?
  - o Are you a member of the parish staff of the parish?
- Get set up to succeed!
- Everyone likes to hear about success stories, so set up some key measurements to gauge your success:
  - o The # of "new" people you get involved in the development efforts;
  - o The # of new names and updated information that the office was able to get entered into the development database.
  - o The # of one-on-one meetings each month you have with "people who can make a difference";
  - o The # of contacts you make with alums of the school who have not gotten involved in years - probably because they have not been invited.
  - o The # of Input Sessions you hold to receive attitudinal data about the parish/school;
  - o The # of people who are helping the parish/school in a long-range planning process;
  - o And, the list can go on and on.
- Record and report success.

### **IX. Work from a strategic plan that advances the institution.**

- Some development directors in Catholic institutions never make it past Year 1 or Year 2. There are many reasons for this; however, one of the most common ones is there was no written plan by which to work. And, when there is nothing down on paper, sometimes the only way to operate is "by the seat of your pants."
- Crisis du jour. Are you in reactive mode or active mode? Are you dodging bullets or firing the gun? A lot will depend on whether you have a written plan to go by.

### **X. Don't get bogged down with the "900 lb. gorilla".**

- Although well intentioned, there are people you will meet when you open up your one-person shop who will have all the advice in the world. They will tell you how they:
  - o Raised \$10 billion dollars 15 years ago;
  - o Organized the best plan in the world - with two other people;
  - o Can help you if you will only follow their lead and advice;
  - o Will give you all kinds of money if you do A, B and C;
  - o Will "turn you on" to where all the "big money" is in town;
  - o Have been saying that this parish/school needed a development office now for years - yet they have no clue to what development is or is not and only see it as raising money.
- Beware of the 900 lb. gorilla. This person has all the answers, but does not know what the questions are, and usually they are vastly different than what this person expects.
- There is a great deal of difference between Catholic development, non-profit development, and public fund-raising. This is like being on three different planets. Yet, there are those who have some experience with the latter two who think they can apply the same answers to Catholic development. This cannot be done. Catholic development is about people; it is about building a faith community; it is about evangelizing; it is about developing life-long relationships; it is about walking hand in hand along the journey and building the Kingdom of God along the way.
- Best Wishes and God speed!

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## CONGRATULATIONS TO ST. SUSANNA PARISH AND ST. GEORGE PARISH!

This past weekend, April 30 - May 1, 2005, St. Susanna Parish in Mason, Ohio dedicated their new, modern 1,500 seat church. With a growing parish of over 3,000 families, Father Harry Meyer and many other parish leaders began this project over five years ago. Through all kinds of bends and twists in the road, Father Harry and the Operational Chairs of the Campaign remained steadfast in their resolve to open a new church that would accommodate all families in the parish. At the dedication, there was standing room only. Millions of dollars were raised, but the key theme from Day One was people involvement and engagement in the life of the parish. Father Harry will be moving on in the near future, and his successor has been named; however, he is leaving behind a legacy of hope and persistence - to a vision that has been shared with thousands.

On May 1st, Father Tom Ranzino and many other leaders of St. George Parish in Baton Rouge, Louisiana dedicated the new buildings that are part of their Site Master Plan. Completing the second phase of their capital campaign, which generated \$4.5 million, the campus now has a new classroom building for school and parish education, a new gymnasium/cafeteria, a new nursery school facility, and a new administration building. Led by hundreds of parish and school leaders, St. George Parish remains committed to leaving a legacy for future generations of parish families. Completing his twelfth year as pastor, Father Tom now moves to a new assignment, and just like Father Harry Meyer, leaves behind the physical facilities needed to live out the mission of the Catholic Church.

It has been ISPD's privilege to have worked with both Father Harry and Father Tom on these projects. They are true believers in the meaningful involvement of people in a dynamic vision for the future.

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## UPCOMING 2005 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 \$49-\$99 We hope you'll join us soon!

**Topics Include:** \*\* Attracting New Students \*\* Total Stewardship \*\* Long-Range Planning \*\* Annual Funds & Capital Campaigns \*\* Charge Up Your Development Battery! \*\* Building A Stronger Image for Your Catholic School \*\* Involving More People in Your Catholic Institution \*\*

**Scheduled Locations:** \*\* Brooklyn, NY \*\* Chicago, IL \*\* Cleveland, OH \*\* Columbus, OH \*\* Cullman, AL \*\* Denver, CO \*\* Dubuque, IA \*\* Erie, PA \*\* Erlanger, KY \*\* Harrisburg, PA \*\* Hartford, CT \*\* Lacrosse, WI \*\* Lake Charles, LA \*\* Miami, FL \*\* Naperville, IL \*\* Newark, NJ \*\* Omaha, NE \*\* Philadelphia, PA \*\* Pittsburgh, PA \*\* San Francisco, CA \*\* St. Claire Shores, MI \*\*

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*ISPD - Bringing people, process and ministry together to build the Kingdom of God*

E-mail: [ispd@bellsouth.net](mailto:ispd@bellsouth.net)  
Phone: (800) 299-2393  
Website: <http://www.ispd.com>

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