



May 2006

Development Directions

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

THE "WORLD CLASS" ANNUAL FUND

The week after Easter, I had the opportunity to speak at the NCEA Convention in Atlanta. Originally, the convention was to take place in New Orleans, but with the aftermath of Hurricane Katrina, the city was unable to host a convention of this size, so it was moved. In addition, I had wanted to speak on the relationship of quality to a Catholic institution's ability to generate resources, but when I received my assignment from NCEA, there was a need for a presentation about annual funds. Quite obviously, this is always a timely topic.

With the new speaking assignment, it did give me time to reflect on what Catholic schools were doing with their Annual Fund (also called "Annual Giving" or "Annual Appeal"). So, for 3-4 months, through our workshops, personal phone calls and consulting clients, I inquired: What is a "world class" Annual Fund? And, do you have one?

The results were quite interesting. Most Catholic institutions, who were implementing an Annual Fund, were doing it in one of two ways:

1. A direct mail appeal with a brochure, pledge card, letter and return envelope;
2. A direct mail appeal with all of the above followed by some sort of phonathon.

90% of the people with whom I spoke were doing one or the other, and this became a major concern in terms of our philosophy of development. ***Development is the meaningful involvement of people in your mission and vision for the future.***

I will never forget, years ago, working with Bishop Carroll High School in Wichita, Kansas. Some of their school personnel had attended a workshop of ours, and shortly thereafter, we were invited to work with them in a consulting relationship. One of their first questions was: How do we improve our Annual Fund? They had just completed their first Annual Fund that year and had raised under \$10,000 with 50-100 people participating. So, for the next several months, we "re-engineered" their Annual Fund with a lot of personal outreach, and real "people leadership" and the second year, their Annual Fund engaged hundreds of people and went over \$100,000! Not difficult if we understand there are different kinds of Annual Funds. Of course, it also helped having

the leadership from Karen Gomez, Bishop Carroll's development director.

At the NCEA Convention, I presented that there are four kinds of Annual Funds.

- **Annual Fund A**: The direct mail appeal sent out to everyone on the database – very generic and mass-produced
- **Annual Fund B**: The same direct mail appeal but this is followed by some kind of phonathon – usually done internally
- **Annual Fund C**: Beside what is in A and B, this Annual Fund adds a key component: the Major Gift Division. In this Annual Fund, anyone who is capable of considering a gift of \$1,000+ is invited personally through one-on-one visits and/or a major gift reception.
- **Annual Fund D**: This is the “world class” Annual Fund. This one has all of the above components yet the emphasis is on people. Here are the parts:
 - **Principal's or President's Cabinet**: This is a personal one-on-one invitation for key individuals who can give \$3,000, \$5,000, \$7500, or \$10,000 each year to sit on a Cabinet that meets twice per year and advises the president and/or principal. The goal is to add 5-10 new people every year – depending on your demographic makeup.
 - **Annual Fund Chairpersons & Associate Chairpersons**: The Chairpersons are usually 2 couples who chair one year and the associate chairs (another two couples) pick up the chairpersons' job the next year. That way, you always have a feeder system.
 - **Annual Fund Cabinet**: These are the chairs of all of the divisions of the Annual Fund:
 - ***Major Gift Division***: Concentration on \$1,000-\$2,000 gifts
 - ***Leadership Gift Division***: Concentration on leaders of the school who do not fall into the President/Principal Cabinet or the Major Gift Division (faculty, support staff, board members, etc.)
 - ***Parent Gift Division***
 - ***Alumni Gift Division***
 - ***Business Community Gift Division***
 - ***Friends*** (past parents, grandparents, and friends of the school)
Gift Division
 - Each of the divisions has different strategies, different teams and ALL of them are built around personal outreach (one-on-one, receptions, informal gatherings, cup of coffee meetings, out of town socials, etc.) whenever possible.
 - The “world class” Annual Fund begins in May of the preceding year by evaluating the present year's Annual Fund and offering ways to improve. The leadership is put in place during May, June, July and August. The literature is ready for September, and the entire operation is “fine-tuned” every year.

As we mentioned at the Convention, this may take 2-5 years to put in place – depending on where you are in the makeup and structure of your present Annual Fund. Does the “world class” Annual Fund produce results? Absolutely! Those Catholic institutions who have worked hard at making sure their Annual Fund takes top priority continue to reap many benefits --- mainly, the vast number of people who consider themselves “true stewards” of that Catholic school – year after year after year.

NEED MORE STUDENTS IN YOUR CATHOLIC SCHOOL?

ISPD INTRODUCES A NEW & EXCITING 12 MONTH CONSULTING PROCESS

Over the past five years, ISPD has presented over 50 workshops on “Attracting New Students to Your Catholic School.” With this topic being a major concern of many schools across the country, we have often been asked to provide a professional, consulting process focused entirely on this subject. Many Catholic school leaders, after working with one of the ISPD presenters for a day or two often wanted that person to lead them through a process that would increase enrollment and also retain the students they already had. Here at ISPD, we are excited to announce that we now offer this specific and much sought-after consulting process.

Over the past year we have spent many hours developing the steps in this consulting process – all meant to take a Catholic school from where they are in marketing and move them forward. Here are the major components:

6. **ISPD Assessment**: In the first 4-6 weeks, ISPD will assess all areas of public relations, marketing, and retention of students. This will be done through one-on-one interviews, small group sessions, examination of materials, and also having the school answer 10-15 questions that will give us key information. An Assessment Report will be presented.
7. **Marketing Core Team**: This is a group of 12-15 people who will work closely throughout the 12 month period with school leaders and ISPD in implementing the steps of this consulting process.
8. **Data Gathering**: ISPD will conduct attitudinal, image and interest surveys with some of the following publics:
 - Faculty and staff
 - Students
 - Parents
 - Alumni
 - Feeder sources
 - Pastor and principals
 - Prospective families
 - Parishioners
 - Others at school leaders' request
9. **Education and Communication**: ISPD will offer workshops on “Attracting New Students” to faculty, staff, students, parent leaders and boards. In addition, we will create a one page newsletter to keep everyone abreast of the progress of the work – month to month.
10. **Student Retention**: ISPD will examine all data in regards to families who have prematurely left the school. We will also suggest specific strategies on how to improve overall tone, atmosphere and morale of the school's culture.
11. **Strategies Producing Immediate Results**: Within the first 90 days, ISPD will begin working in key areas where immediate impact is possible. These are:
 - Student and Parent Ambassador Teams
 - Improving Open House

- Looking at the different types of Open Houses to offer
 - Assessing marketing materials
 - Prospect identification
 - Prospect database
 - Total Quality workshop on “customer service” to all key internal publics
12. **Marketing Advisory Council:** ISPD will facilitate 4 meetings of the Marketing Advisory Council – a group of 60-80 people (hand selected) who will create the new draft plan for “Attracting and Retaining Students.” Parents, faculty, staff, prospective parents, feeder source leaders, neighbors, alumni and others will be identified by the Core Team and then personally invited to be part of this Marketing Advisory Council.
 13. **Convocation:** With the top 5-10 priorities coming from the Marketing Advisory Council, ISPD will facilitate an evening Convocation in which parents, parishioners, students, faculty and staff, alumni, feeder sources, and many others will be invited to come on campus and offer suggestions on how to implement these top priorities.
 14. **Final Marketing Plan:** Based upon the input from the Advisory Council and the Convocation, ISPD will work with the Core Team and the school leaders in writing the Marketing Plan for the school, which will be implemented over the next 12-18 months by school leaders. Some sample key areas to be included in the Marketing Plan could be:
 - Promotional materials
 - Parent-Student-Teacher involvement in marketing the school
 - Retention of students
 - Open House improvement
 - Media outreach
 - Outreach to feeder sources
 - Getting prospective families on campus
 - Inviting alumni to assist in marketing the school
 - Role of the parish in student marketing (where applicable)
 15. **Implementation of the Plan:** ISPD will train school leaders and implementation teams on how to implement the Final Marketing Plan – with strategies, persons responsible, timelines and deadlines.

Here at ISPD, we are excited about bringing this new process to Catholic schools throughout the country. Behind all of these components, there is the underlying theme of our company: Invite, involve and engage people into the life of your Catholic institution and so many positive and amazing things will happen. We would like to work with you to do this.

Please call our office at 800-299-2393 or e-mail our president, Frank Donaldson, at ispd@aol.com in order to discuss this further. One of our associates will be glad to come to your campus and present the details of this exciting consulting process.

SPRING 2006 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-\$149 .

We hope you'll join us soon!

Topics Include: ** Strategic Plan for Development for Parishes & Schools **

** Total Stewardship ** Annual Funds & Capital Campaigns **
** Charge Up Your Development Battery! **

Scheduled Locations: Las Vegas, NV ** Pittsburgh, PA ** Sante Fe, NM

- [Check Here for Details](#)

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

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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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