



May 2008

Development Directions

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

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"ONE PERSON DEVELOPMENT OFFICE"

By Frank Donaldson, President

Tenets for Success

1. **Understand 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 3-5 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:
 - Assess your present situation
 - Create/affirm the mission
 - Clarify and articulate your vision
 - Set up the goals to live out the mission and vision
 - Invite and involve people to build this vision with you by creating and implementing a long-range advancement plan
 - Continue to improve (develop) over a period of years by building on the many people relationships you have established and continue to establish
- Understand ISPD's 7 I approach to Catholic development:
 - Identify

- Inform
 - Invite
 - Involve
 - Implement
 - Invest
 - Improve
- In setting up a one-person development office, it is paramount that the development director really understands development, has the necessary training available, has a written plan to go by, and has a supportive network of people to guide the success.

2. **Educate your Inner Circle.**

- If our first tenet 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.

3. **Assemble a Core Team.**

- A development director in a one-person shop cannot do it all. Essential to success is assembling a Core Team of 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
- The pastor and/or the principal need to be ex-officio members of the Core Team but should not be counted in the number. It is very important that they attend the early meetings, and then set up a regular time when they would be in attendance. If they are able to attend all meetings, that would be preferable.
- Usually, most Core Teams meet weekly or every other week for one hour.

4. **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. 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:
 - To gather as many people as possible to unite with that parish and/or that school
 - 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 the Kingdom
 - 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**.
 - Development is all about the meaningful involvement of **people**.
 - Implementing development efforts greatly depends upon the quality of the **processes** you use.
 - 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 is 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.

5. **Re-charge your battery.**

- Catholic development directors quickly realize that their job is not 9-5. Those that

approach the position with that mentality usually do not last very 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.

- Educating the internal leadership of the parish/school is extremely important. Without the parish staff, the faculty/staff, the parent leaders, and others knowing what you are doing, then don't be surprised if you hear some of the following statements:
 - "I wonder what she really does? We hardly ever see her - she stays cooped up in her office all the time."
 - "Did you hear what that new development director is making? I hear he is raking in the money; more than what we make."
 - "What kind of hours does that new development director keep? I mean I see her strolling in here around 9 or 10 o'clock some mornings. I wish I had her job."

Educate your internal publics - consistently.

- Priority planning is a must; having a Core Team is a must; volunteer help in the development office is a must; scheduling time off is a must.
- Your life as a development director 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 director 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 people should be driven by the compass and not the clock.
- Keep your battery charged.

6. **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. We always say that "program" thinking is short-sighted. It almost goes along with people who say 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 into 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.
 - This approach requires a strong base of people to help organize, make decisions, go on visits, and invite the gifts.
 - 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.
 - This approach is built around people - meaningfully involving them in the mission, the vision, the goals and the case of the institution.

- 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.
- This approach provides a wonderful opportunity to build community and also to evangelize.

7. 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 director 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 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.
- When a one-person shop gets started, usually the first year or so will go well. Today, in Catholic development, we have enough "starter" materials and booklets that can challenge anyone for 1-2 years. The good part about all of this is that most development directors, principals, and pastors usually begin by doing the right things right. But, sometimes, after a year or so and "new" money begins to come into the coffers, the emphasis shifts from people to dollars. This is the fatal mistake. Always remember: In a successful Catholic development effort - built around people - your success in the future will greatly depend upon those key action strategies that you worked on and implemented in the past.

8. 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:
 - Listen
 - Record
 - 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 were 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)
 - Microsoft Publisher (page layout program)
 - ACT! (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?
- Are you a member of the administrative team of the school?
- 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:
 - The # of "new" people you get involved in the development efforts
 - The # of new names and updated information that the office was able to get entered into the development database
 - The # of one-on-one meetings each month you have with "people who can make a difference"
 - The # of contacts you make with alums of the school who have not gotten involved in years - probably because they have not been invited.
 - The # of Input Sessions you hold to receive attitudinal data about the parish/school
 - The # of people who are helping the parish/school in a long-range planning process
 - And, the list can go on and on.
- Record and report success.

9. 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.

- When you have a written plan to go by, then you have one of the key tools to assure success. Follow it and be accountable to it.

10. **Don't get bogged down with the 800 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:
 - Raised \$10 billion dollars 15 years ago
 - Organized the best plan in the world - with two other people
 - Can help you if you will only follow their lead and advice
 - Will give you all kinds of money if you do A, B and C
 - Will "turn you on" to where all the "big money" is in town
 - 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 800 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 political fund-raising. This is like being on three different planets. Yet, there are those who have some experience with the latter 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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