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Development Directions

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

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Creating the Case Statement for Your Capital Campaign

By Frank Donaldson, President

INTRODUCTION

The single most important document for a capital campaign is the Case Statement. We always tell pastors, principals, presidents, and campaign leaders to imagine themselves sitting at the witness stand in a court room and the judge says, "State your case!" That is exactly what you are doing; you are providing the rationale and justification of why you are conducting a capital campaign and why people should support it.

It works extremely well when parish/school leaders have done a Comprehensive Case Statement for the parish/school before the Capital Campaign Case Statement. The Comprehensive Case Statement is a collection of data which details where the parish/school has come from (history), where the parish/school is today (ministries, programs), where the parish/school would like to be in the future (long-range plans, needs), and ways that people can invest in the future. The Comprehensive Case Statement creates a CAUSE for people to support. From this statement will come the Capital Campaign Case Statement. However, all of the material flows from the mission of the parish/school and the Comprehensive Case Statement.

KEY QUESTIONS FOR SUCCESS

Before beginning to work on the Case Statement for the Capital Campaign there are some key questions that need to be answered. These questions will not only assess readiness, but they will also provide focus and help you begin writing the Case Statement.

They are:

- Why is this campaign necessary?
- Whose idea was this - originally?

- Who makes the decision to go ahead?
- How many people have been involved in the decision-making process?
 - What specific groups?
- What percentage of parishioners, parents (if applicable), staff, etc. know about the expansion or building project?
- Have any negative or constructive remarks been made? If so, what?
- If asked, would parishioners, parents (if applicable), staff, etc. agree that this proposed campaign is the right one?
- How valuable would it be to gather further data on attitudes?
- Is there confidence in the leadership?
- What role should key leadership groups play in this campaign?
- Is the long-range, strategic plan "driving" this campaign?
- Is there a master plan for buildings and grounds?
- How can this campaign be a "springboard" into future development?
- How can you use this campaign to evangelize?

THE WAYS A CASE STATEMENT IS USED

A well-developed Campaign Case Statement will take into consideration the above questions, and also serve as the cornerstone for the campaign in the following ways:

- It will provide a basis and a foundation for the parish/school leadership to agree upon - so that there is a dedication to the cause and a precise focus of the parish/school mission and long-range goals.
- It will give a strong direction on how to most effectively present the parish/school mission, vision, and case to your key constituents.
- It will inform leaders and staff of your vision and will demonstrate how the success of the campaign will work to the immense benefit of those the parish/school serves.
- It will invite and involve new leaders to the campaign and will allow them to understand the rationale and importance of the campaign.
- It will serve as an early working document and cultivation piece for prospective donors. It will be used in the feasibility study.
- It will serve to help others endorse and "buy in" to your vision.
- It will serve as the basis for future publications - brochures, newsletter, letters, announcements, etc.

THE KEY COMPONENTS OF A CAMPAIGN CASE STATEMENT

There are different outlines for a Campaign Case Statement; however, we have found one that has worked for us in many campaigns we have directed. There are twelve components.

1. ***Justification of the Campaign***
 - What are the needs? What are the general plans to solve the needs?
 - Why now?
 - How does this Campaign fit into the overall Master Plan?
 - History, philosophy and mission: key points
 - Present position of the parish/school in the community
 - How will this Campaign benefit the community?
2. ***Proposed Solution: Explanation of the building(s) & improvements***
 - New structures
 - Renovations
 - Additions
3. ***Summary of Gains***

- For parishioners
 - For parents
 - For staff
 - For leadership
 - For school constituents
 - For community
 - For business community (if applicable)
4. **Projected Costs**
 - Basic breakdown of all costs
 5. **Past Responses to Facility Needs**
 - How past campaigns have been supported
 - How parishioners have seen the parish/school as "theirs"
 6. **Past Responses to Financial Needs**
 - Stewardship of finance
 - Annual Fund
 - Past successful campaigns
 7. **Site Plan Diagram**
 - Scaled to fit 8 1/2 x 11 format
 8. **Summary of the Campaign General Goals**
 - What do you plan to accomplish with the campaign
 - What are the general goals for the parish/school?
 9. **Campaign Divisions**
 - Lead Gifts
 - Major Gifts
 - Leadership Gifts
 - Parishioner Gifts
 - School Gifts (if applicable)
 - Community Gifts
 10. **Naming Opportunities**
 - Name buildings (if applicable)
 - Name parts of the building
 - Memorials
 11. **Ways to Make A Gift**
 12. **Campaign Leadership**
 - The people who will lead the campaign

HOW TO WRITE THE CASE STATEMENT

Quite simply, the case statement is usually put together in a five-step process:

1. Those who are best informed about the parish/school furnish the data and the basic information.
2. A skilled, professional writer - who understands Catholic Development, Total Stewardship and fund-raising - develops the information, determines the concepts, and puts the material in written form.
3. The parish/school leadership then edits the case statement so that "it sounds like us."
4. The professional writer then redrafts the statement to incorporate the parish/school changes and suggestions.

5. The Campaign Case Statement is then integrated into the life of the Campaign.

ISPD Hosts First Webinar

On Monday, November 24, 2008, ISPD hosted our first one-hour webinar on "Getting Your Parish/School Ready for a Capital Campaign." There was no charge for the webinar. Based upon the responses we have received, it was a huge success and certainly will prompt us to host more one hour webinars in the future.

Here are the results:

- 56 people registered for the Webinar.
- 36 people actually signed on and participated.
- 20 filled in the post-webinar survey and said the following:
 - 12 rated the webinar "VERY HELPFUL."
 - 7 rated the webinar "HELPFUL."
 - 1 rated the webinar "NOT HELPFUL." (Although this person was only in the session for 4 minutes and 28 seconds).

Although a webinar does not allow for a lot of interchange between the presenter and the attendees, there are opportunities to ask questions (by typing in the question while the webinar is going on). In addition, attendees can "raise their hand" and the presenter can un-mute their audio to allow that question to be raised. There are also polls and surveys that can be taken both during the webinar and afterwards. All in all, it was a good experience and webinars do allow all to simply have another tool in the toolbox in terms of communication, education and instruction about specific topics.

HAPPY THANKSGIVING!

All of us here at ISPD would like to wish all of you a very Happy Thanksgiving this year. May this be a time of relaxing, visiting with friends and family, re-charging the battery, and being thankful for all of God's blessings.

ISPD 15 MIN Educational DVDs on Catholic Development Free upon Request

- *An Introduction to Long-Range Planning for Catholic Parishes*
- *An Introduction to Long-Range, Strategic Planning for Catholic Schools*
- *An Introduction to ISPD's Total Stewardship Process*
- *Creating the Strategic Plan for Development for Parishes and Schools*
- *Inviting, Involving, and Engaging More People into the Life of Your Catholic Parish*
- *Getting Ready for a Capital Campaign, Part I*
- *Implementing a Capital Campaign, Part II*

To receive your free 15 minute DVD, please visit the [Resource Center](#) on our website.



ISPD OFFERS FREE SERVICE: A Place for You to Announce Job Openings in Catholic Development, Advancement and Total Stewardship

ISPD now offers a free service to any Catholic parish, school or diocese. We have a new button on our website entitled *Development Job Postings*. By clicking on this button, visitors can go directly to this page and view job announcements and opportunities from area Catholic institutions. Twice per month in our two newsletters, ISPD will highlight this opportunity and invite readers to view these announcements. These newsletters reach over 10,000 Catholic leaders by e-mail each month.

Each announcement should be no more than 200 words and should invite people to submit a resume to your specific address (e-mail or physical). We ask that you mail new requests (with the announcement attached in a Microsoft Word document) to ISPD@aol.com , including the name of your contact person and a telephone number where we can reach you, just in case we need clarification on the announcement. Announcements will be put in alphabetical order by institution.

- [Click here to read more about these job opportunities in Catholic development](#)



CATHOLIC SCHOOL ENROLLMENT TALK

ISPD is your Catholic School Enrollment Solution for maintaining and/or increasing the quantity, quality, or diversity of your elementary or secondary Catholic school enrollment. *Catholic School Enrollment Talk* is our free monthly online newsletter for anyone interested in Catholic school enrollment solutions.

- [Subscribe today!](#)



FALL 2008 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 \$75-\$99.

We hope you'll join us!

Topics Include:

- ** Annual Fund **
- ** Become a More Welcoming, Engaging & Affirming Catholic Parish **
- ** Best First Steps to Take in Beginning Your Catholic Development Efforts **
- ** Capital Campaigns That Produce Results **
- ** Catholic School Enrollment Solutions **
- ** Customer Service in Your Catholic School **
- ** Long Range Planning **
- ** One Person Development Office **
- ** Total Stewardship **

Locations Include:

Atlanta - Baton Rouge - Chicago - Dallas/Fort Worth - Dayton, OH
Denver - Minneapolis/St Paul - Nashville - New Orleans - Orlando
Philadelphia - Pittsburgh - San Francisco

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](#)

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

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Visit our web site for free resources and valuable information.

The Institute of School and Parish Development (ISPD) is a national, Catholic development consulting firm created to serve Catholic schools, parishes and dioceses in the areas of planning, marketing, fund-raising, and resource development.

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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