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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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Moving from Fund-Raising to Development Part II The 15 Step Process

By Frank Donaldson, President

(Note: If you did not receive Part I, please visit our website at www.ispd.com and click on the "[Resource Center](#)" button for access to past newsletters).

- **Step 1 - Educate the leadership (decision makers) of your institution on the difference between development and fund-raising.**
 - They **must** understand. Please, do not proceed unless the leaders have a clear understanding of these differences.
 - The best way to clarify for anyone is to explain the differences between Development \$\$\$ and Fund-raising \$\$\$\$. For example, the calendar raffle sale is considered Fund-raising \$\$\$ and the Annual Appeal is considered Development \$\$\$.

- **Step 2 - Determine how important it is for the school/parish to move more into development.**
 - This is one of those "Come to Jesus" meetings that you must have between and among parish/school leaders. If development is only important to 50% or less then you have more education to do.

- **Step 3: Understand the budget considerations and what is feasible to do and what is not feasible to do.**
 - If your parish/school looks to the fund-raisers to balance the budget, then you will need to know that.
 - Good fund-raisers do three major things:
 1. Raise good net dollars.
 2. Cultivate good leaders.
 3. Build community.
 - It may be that it will take you 2-5 years to move into a solid development effort;

however, we can assure you that the results are going to be worth it - in people, connections, resources, and money.

- **Step 4 - Create a visual called "Present Fund-raising Activities."**
 - You need to list all the fund-raisers you do - how much money is raised, how many hours it takes to organize, what time of the year it is held, who is asked for the money, etc.
 - We strongly encourage you to "blow up" a visual on poster paper or through a power point presentation, or by some other means. It must show a realistic picture of your fund-raising "landscape."

- **Step 5 - Educate and inform all key fund-raising groups on what the present visual looks like and means.**
 - You can do this through 1-2 main meetings, or you can go to individual meetings (Parents' Club, Student Council, Parish Council, etc.) and present and explain the visual.
 - Point out both the pros and cons of moving from fund-raising to development.
 - At these meetings have a member from each organization, club, group, etc. fill out a form that lets you know how much money they need annually to survive.

- **Step 6 - Form a sub-committee made up of representation from key groups within the parish/school.**
 - 8-10 members
 - Have the development director (or parish council member or school advisory council member) chair this sub-committee.
 - Give this group a name.
 - If you have a Core Team in place, you may be able to use them, as long as there is good representation.

- **Step 7 - Have the sub-committee create a mission statement, philosophy and rationale for fund- raising activities at your institution.**
 - This is very important. What is the philosophy of future fund-raising activities. What is the rationale? What are you trying to achieve by doing this?

- **Step 8 - Have the sub-committee create an Application and Approval Process for all fund-raising activities.**
 - We feel it is important that every group, club, organization, etc. who wants to conduct a fund-raiser, submit an application and answer key questions.
 - Information to gather:
 - Name of group, organization, ministry, club, etc.
 - Name of fund-raiser
 - Description of fund-raiser
 - Month and date to be held
 - People asked to support
 - Gross amount raised
 - Net amount raised
 - Previous year's results

- **Step 9 - Develop a Master Plan for next year (school or calendar) and highlight the following:**
 - Emphasis on the Annual Appeal Campaign
 - 2-3 key major fund-raisers
 - Small fund-raisers that do not interfere with the present donor base
 - The key here is to develop a healthy amount of fund-raisers while phasing in a good development effort.

- **Step 10 - Have the sub-committee create an Integrated Annual Appeal Campaign in**

order to fund three areas:

- Operational budget
 - Needed funds for organizations, clubs, etc.
 - New programs
 - With an integrated Annual Appeal Campaign, you should be able to fund the three areas listed above. If so, then some of the clubs, organizations, etc. who do need money, and whose fund-raisers were not approved, could then be taken care of in the Annual Appeal.
- **Step 11 - Seek a 12-15% increase in donors and 5-10% increase in dollars each year in the Annual Appeal Campaign.**
 - The key here is to expand the donor base while increasing the amount of giving.
 - It will not do any good to the development efforts each year if your donor base does not expand and there is a large turnover of donors. You must work hard in retaining the donors you do have while attracting others through a strong development effort.
 - **Step 12 - Solidify the annual Development Revenue Budget around a strong Integrated Annual Appeal Campaign and 2-3 school and/or parish sponsored fund-raisers (i.e. auction, golf tourney, etc.)**
 - Enough said.
 - **Step 13 - Once solidified, initiate a major gift program focusing on planned gifts, endowment growth and memorial giving.**
 - This will be key to the future. These efforts will solidify the financial future of your institution for years to come.
 - **Step 14 - Create an orientation program for parents and alumni (before your graduates leave you) so they understand that your development revenue will come from those items listed in # 12 and # 13.**
 - Educate, educate, educate.
 - Just because some of your parish/school leaders understand development, just remember that the next year you will have a whole set of new faces - parents, faculty/staff, parish staff, Pastoral Council, etc. They must understand.
 - Get your alums initiated before they leave you. Have them plan their first reunion and elect their officers, before they graduate.
 - **Step 15 - Educate and inform each year so that all groups understand that Development \$\$\$ are a lot more important than Fund-raising \$\$\$.**
 - Develop the materials and the processes to make sure that all groups understand what you are doing - year to year.

Join Us for an ISPD Webinar on November 24

"Getting Your Parish and/or School Ready for a Capital Campaign"

Monday, November 24, 2008
10:00 AM - 11:00 AM CST

Today, many Catholic institutions are faced with a perplexing challenge: the need to launch a capital campaign in order to fund facilities and/or endowments and at the same time, trying to do this in the present economy with which all potential donors continue to struggle.

This ISPD Webinar will walk you through the steps of readiness that are needed in order to launch a successful capital campaign.

Space is limited.

Reserve your free Webinar seat now at:
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(available now)
- ***An Introduction to Long-Range, Strategic Planning for Catholic Schools***
(available now)
- ***An Introduction to ISPD's Total Stewardship Process***
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- ***Creating the Strategic Plan for Development for Parishes and Schools***
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- ***Inviting, Involving, and Engaging More People into the Life of Your Catholic Parish***
(available now)
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To receive your free 15 minute DVD, please visit the [Resource Center](#) on our website.

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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

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- [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 **
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Locations Include:

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

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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.

E-mail: ispd@bellsouth.net

Phone: 800-299-2393

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Institute of School & Parish Development | 2713 Athania Parkway | Suite 200 | Metairie | LA | 70002