



## ***EVALUATING THE EFFECTIVENESS OF YOUR CATHOLIC SCHOOL DEVELOPMENT EFFORTS***

Whether a Catholic school has a vibrant development effort “up and running,” or is just getting started with a more organized approach, there is great value in assessing what you are doing. In this month’s presentation in the Resource Center, author Frank Donaldson ([ispd@aol.com](mailto:ispd@aol.com)) offers a self-assessment that is built around answering either “TRUE,” “FALSE,” OR “SOMEWHAT” – the TFS Test.

There are 145 statements to answer, and after taking this “test” participants should be able to identify the strengths and weaknesses of their Catholic school development efforts. At the completion of the “test,” there is even a scoring system that allows you to see how you did. Once again, one of the first steps in any development process is assessing where you are. This instrument should give you an excellent perspective.

### **True - False - Somewhat Test (TFS Test)**

*Please write T if the statement is True for your school, F if the statement is False for your school, and S if the statement is neither all True nor all False. In other words, it is somewhat true and somewhat false. Please write NA for not applicable.*

#### **Assessment Area # 1: Development Principles**

1. \_\_\_ Even though you may not have a formal effort, you do recognize the need for development in your school.
2. \_\_\_ Your internal publics (adm., faculty, boards) understand that development is not just fund-raising.
3. \_\_\_ The development effort is being run with complete integrity.
4. \_\_\_ You do realize that development is a whole new way of looking at things.

5. \_\_\_ One of the topics for discussion at your board meetings is in the area of development.
6. \_\_\_ Your school has a clear mission statement that is shared with all key internal publics.
7. \_\_\_ Your school does have a long-range, strategic plan of some kind in place.
8. \_\_\_ Your academic program is top notch.
9. \_\_\_ The principal understands the development process and supports the efforts.
10. \_\_\_ Your school leadership operates under the principle: "In order to make money, we've got to spend money."
11. \_\_\_ Your development effort is making progress year-to-year and the yardstick of measurement is the following:
  - Involvement of people
  - New approaches to old problems and situations
  - New money from new publics
  - Creativity
  - Further understanding of the marketplace
12. \_\_\_ Your development effort concentrates heavily on cultivation of people.
13. \_\_\_ You are always looking to involve people from a Win-Win Position by answering the question: What's in it for them?
14. \_\_\_ Your development effort is pro-active and not re-active.
15. \_\_\_ Your development effort is done just as much person-to-person and in small groups rather than just on paper and through direct mail.

**Assessment Area # 2: Development Organization and Structure**

16. \_\_\_ You do know the various "publics" who make up your school and who is capable of giving time, talent and \$\$\$.
17. \_\_\_ Your database is up-to-date on the following publics:
  - Internal**
    - Administration
    - Faculty/Staff
    - Internal Boards and Committees
    - Students

### External

- Parents
- Alumni
- Grandparents
- Parents of alumni
- Businesses
- Feeder sources

18. \_\_\_ Through fund-raising efforts, you have been able to identify who is capable of helping you financially.

19. \_\_\_ There is an organizational chart in place that shows the relationship of development to the rest of the school.

20. \_\_\_ There are clear job descriptions in place for those people working with the development efforts.

21. \_\_\_ Your development effort has one of the following configurations:

- Full-time development director
- Part-time development director
- Volunteer development director or committee
- Consultant and volunteers
- Consultant and paid part-time or full-time development director
- Development Team

22. \_\_\_ You have a formal budget for the development department.

23. \_\_\_ You do see the value of a professional development assessment done by an outside firm that can objectively assess your situation, tell you what the strengths and weaknesses are, and then make recommendations for future growth.

24. \_\_\_ The development director is considered part of the administrative team.

25. \_\_\_ The people involved in development have attended one or more professional workshops in order to receive proper training in this field.

26. \_\_\_ You have begun to build a library of professional reading materials on development.

27. \_\_\_ You have adequate office space and the necessary "tools of the trade."

- Computer
- Good software
- Telephone
- Fax

- Filing space and cabinets
- Access to good copy machine
- A budget
- Work space
- Good volunteer help
- Good location of the office in the school

28. \_\_\_ You have looked for ways to collaborate with other Catholic schools in your area.

29. \_\_\_ You have conducted key attitude/image/interest surveys with some of the following markets:

- Students
- Faculty/Staff
- Parents
- School leadership
- Alumni
- Feeder sources
- Community leaders
- Pastors/principals

30. \_\_\_ Your development personnel (paid and/or volunteer) are members of one or more professional development organizations:

- A local collaborative group in your area
- AFP (Association of Fund-raising Professionals)
- NCDC (National Catholic Development Conference)
- CASE (Council for the Advancement and Support of Education)

31. \_\_\_ You have over 100 people meaningfully involved in your development effort on an annual basis through some of the following means:

- Input Sessions
- Development Advisory Board
- Long-Range, Strategic Planning
- Alumni Development Board
- Blue Ribbon Committee
- Annual Fund Cabinet
- Capital Campaign Cabinet
- Case Statement Committee
- Parent Ambassador Team
- Alumni Ambassador Team
- Other methods

32. \_\_\_ You clearly understand the percentage of time that you should spend with each area of development.

33. \_\_\_ You know where you want the development effort to go over the next five years.
34. \_\_\_ Faculty members are invited to hand in Wish Lists each year to let you know what they need -- big and small.

**Assessment Area # 3: Internal Marketing**

35. \_\_\_ The faculty/staff understand the development process and support it.
36. \_\_\_ You have in-serviced all key internal publics:
- School Board
  - PTA leaders
  - Leadership Boards and Committees
  - Student leaders
37. \_\_\_ There is some kind of regular communication to all internal publics in regards to what is happening with the development effort.
38. \_\_\_ Faculty members have been given opportunities to get involved in the development effort and some are participating.
39. \_\_\_ Faculty members have been invited to input into the mission statement.
40. \_\_\_ Internal publics are involved in the recruiting effort.
41. \_\_\_ Internal publics (the messengers) clearly understand the mission (the message) of your Catholic school and speak about it in a positive manner.
42. \_\_\_ Your internal publics understand the school's history, heritage, and unique qualities.

**Assessment Area # 4: Public Relations**

43. \_\_\_ You have clearly identified all the key publics with whom you want to relate, and you have strategized ways in which to reach these people.
44. \_\_\_ The person who answers the phone at your school is polite, cordial and treats the call with utmost courtesy.
45. \_\_\_ Receptionists have been trained on how to answer the phone at your school and what to say and what not to say.

46. \_\_\_ Your school does send in news releases to area newspapers on a regular basis.
47. \_\_\_ Visitors are welcomed with politeness when they enter the school.
48. \_\_\_ The bulletin boards within the school are decorated with positive messages that reflect the mission.
49. \_\_\_ Parent, student and faculty concerns are met with immediate attention and concern.
50. \_\_\_ The principal projects a positive image -- one that shows a person who does have time for others.
51. \_\_\_ Students are recognized for achievement -- both inside the classroom and out.
52. \_\_\_ Your school participates in Catholic Schools' Week and uses this time for excellent public relations.
53. \_\_\_ The grounds are clean; the grass is cut, and your school projects a clean-cut image.
54. \_\_\_ There is parking available for visitors.
55. \_\_\_ Students understand the value of having their uniform neat and clean.
56. \_\_\_ Faculty members and administration reflect a professional image by the way they dress, speak and appear.

**Assessment Area # 5: Publications/Communications**

57. \_\_\_ Your school has a clear logo or visual image that is recognized and accepted by all.
58. \_\_\_ There is one person that "clears" all publications leaving the school.
59. \_\_\_ You have clearly identified those 1-15 words that clearly describe your school and what you are all about.
60. \_\_\_ The image your publications are projecting is the type of image you want to project?

61. \_\_\_ You have involved professional expertise to help with your publications and communications.
62. \_\_\_ You do put together an excellent Open House each year.
63. \_\_\_ You do have many ways in place for potential students and parents to come on your campus for activities.
64. \_\_\_ You have been communicating in some kind of positive way with the following groups:
- Faculty/Staff
  - Parents
  - Students
  - Internal Boards and Committees
  - Alumni
  - Grandparents
  - Businesses
  - Feeder sources
  - Parents of alumni
65. \_\_\_ You have been able to communicate the fact that your school has unique qualities and is here to stay.
66. \_\_\_ You are putting a formal communication process in place:
- Pocket folder
  - Profile Sheet
  - "All Publics" newsletter (The Quarterly)
  - Recruitment brochure
  - Case Statement
  - Annual Report
67. \_\_\_ You have an Annual Report in place that lets people know what is done with the money they have invested in your Catholic school.
68. \_\_\_ You are working on a Case Statement for your school that clearly shows where the school has come from, where it is, where it is going, and the many ways people can invest in the school's future.
69. \_\_\_ You do use your publications to involve the alumni in their school.
70. \_\_\_ You have a quarterly newsletter in place.

*Assessment Area # 6: Recruiting/Retention*

71. \_\_\_ Your recruiting effort is built around the word **need** -- the need of a student to find a school that will develop his/her academic and personal potential, and the need of a school to replenish its ranks with students who respond to the kind of institution it chooses to be.
72. \_\_\_ You do know what your potential students really want.
73. \_\_\_ You do know how you can deliver better than the competition.
74. \_\_\_ The entire school is in constant "marketing mode"
75. \_\_\_ You understand the demographics and economics of your geographical area.
76. \_\_\_ You have a clear prospect list that is consistently updated.
77. \_\_\_ Your recruiting effort is evaluated -- objectively -- at least every two years.
78. \_\_\_ You do have some kind of organization in place to recruit new students.
79. \_\_\_ You do have some kind of retention program in place to retain the present students you already have.

*Assessment Area # 7: Alumni*

80. \_\_\_ You have a good database of alumni names/addresses/e-mails/phone numbers.
81. \_\_\_ Your alum base has been receiving good communications from you on a regular basis.
82. \_\_\_ You have an Alumni Association with dues paying members.
83. \_\_\_ You have social events in which your alums may participate.
84. \_\_\_ You have a class representative system in place.
85. \_\_\_ You have an alumni board that oversees and provides input into alumni activities.
86. \_\_\_ Former faculty members are invited to reunions.

87. \_\_\_ You are involving your alumni on campus with regular activities -- for example, Career Day, Homecoming, Open House, etc.

**Assessment Area # 8: Volunteers**

88. \_\_\_ You do have volunteers who are willing to work with your school's programs.

89. \_\_\_ You do have people on your school board and involved in your PTA who are "movers and shakers."

90. \_\_\_ Your volunteers are thanked on a regular basis.

**Assessment Area # 9: Special Event Fund-raising**

91. \_\_\_ Your school is involved in some kind of fund-raising throughout the year.

92. \_\_\_ The fund-raisers and the development effort are not "stepping on each other's toes."

93. \_\_\_ Your special event fund-raisers are doing two major things: building friends and making good net dollars.

94. \_\_\_ Your school is not spending too much time on special event fundraising -- at least not to the point where you are "burning people out."

**Assessment Area # 10: Annual Fund Drive**

95. \_\_\_ You realize that the Annual Fund is usually the first step toward development \$\$\$.

96. \_\_\_ You realize that the Annual Fund is a coordinated, concentrated effort on the part of the school to plan one major, professional effort which can produce better results than a lot of "nickel and dime" efforts.

97. \_\_\_ You realize that you must have a strong case for the Annual Fund, telling people exactly where the \$\$\$ is going to go.

98. \_\_\_ There is a written plan that explains the Annual Fund for everyone.

99. \_\_\_ You realize that a successful Annual Fund cannot be run primarily through direct mail.

100. \_\_\_ You have involved and communicated with enough people to run a successful Annual Fund each year.

101. \_\_\_ Your Annual Fund is set up to run like a "Mini-Campaign" -- with an Annual Fund Cabinet, division chairpersons, major gift component, clear case points of what will be done with the money, etc.

102. \_\_\_ You have built a strong telemarketing component into the Annual Fund.

103. \_\_\_ You are applying the rule of 1/3's: 15-20 people will give 1/3 of the money; 75-100 people will give 1/3 of the money, and the rest will give the last 1/3 of the money.

104. \_\_\_ The number of donors -- each year -- keeps increasing by 15%.

105. \_\_\_ The amount of money -- each year -- keeps increasing by 10%.

### **Assessment Area # 11: Major Gifts**

106. \_\_\_ You have identified your "Top 100" list of potential donors who are capable of giving a gift of \$1000 each year to your school.

107. \_\_\_ You have put together a Blue Ribbon Committee of 15-20 people who can help you further identify your "Top 100" list.

108. \_\_\_ Twice per year you are meeting to update your "Top 100" list.

109. \_\_\_ You understand that the best solicitation occurs when the right prospect is asked by the right solicitor at the right time for the right amount; therefore, research is important.

110. \_\_\_ People from your school who are involved in major gift work have been trained properly in what to do and say.

### **Assessment Area # 12: Business/Community Outreach**

111. \_\_\_ You have begun some kind of community outreach in order to get community/business leaders on campus.

112. \_\_\_ You have identified those businesses that would have an interest in your school and your mission.

113. \_\_\_ You have or are in the process of designing programs for these businesses to get involved with in your school.

114. \_\_\_ You have business leaders involved on your Development Advisory Board -- not just those who are parents and alums but others who have no direct tie to the school.

**Assessment Area # 13: Grant Writing**

115. \_\_\_ You are familiar with the concept of grant writing.

116. \_\_\_ You have identified some foundations, corporations, and/or government agencies from which to seek funding.

117. \_\_\_ You realize that grant writing is not successful when done as a "shotgun" approach.

118. \_\_\_ You have attended workshops and gotten training in the art and science of grant writing.

119. \_\_\_ You have created a "Wish List" from administration and faculty in order to identify those areas where you could seek funding.

120. \_\_\_ One or more specific persons at your school is designated as the grant writer.

121. \_\_\_ Your school has received a grant within the past 12 months.

**Assessment Area # 14: Endowment**

122. \_\_\_ You have begun to build an endowment for your school.

123. \_\_\_ Your endowment effort is set up as a separate foundation with its own corporate structure and board.

124. \_\_\_ Your endowment growth is through major gifts and/or a % of the Annual Fund and is primarily built with alumni and other selected major donors.

125. \_\_\_ Your school leadership is actually making a commitment to endowment and not just paying "lip service" to it.

*Assessment Area # 15: Memorial Gifts*

126. \_\_\_ You have a formal memorial gifts program in place for your school.
127. \_\_\_ You have a nice brochure that explains the many opportunities for people to make a memorial gift through the school.

*Assessment Area # 16: Capital Campaign*

128. \_\_\_ Your school leaders do recognize the value of a capital campaign every 8-10 years in order to construct new buildings, renovate existing ones, and/or build endowment.
129. \_\_\_ Your school leaders understand how the Capital Campaign fits into the overall development effort.

*Assessment Area # 17: Planned Giving*

130. \_\_\_ You do have a basic understanding of Planned Giving and realize that this is an area that can become a very important component of your development effort.
131. \_\_\_ You are using your newsletter to explain Planned Giving opportunities.
132. \_\_\_ You have considered offering a Wills Clinic at some time in the future.
133. \_\_\_ You have identified those people (alums, parents, etc.) who have expertise in planned giving.
134. \_\_\_ Your school has a tax attorney who can advise the school and donors of the many options of a Planned/Deferred Giving Program.
135. \_\_\_ Your school has identified those potential donors who may have an interest in Planned Giving.
136. \_\_\_ Your development officers have received the necessary training in order to understand Planned Giving -- from the school's perspective.
137. \_\_\_ Your school has gathered the important Planned Giving literature that is available in order to form a library of materials.

*Assessment Area # 18: The Magic of Creativity*

138. \_\_\_ Your school's leaders are willing to listen to new ideas, new concepts, and new dreams -- and then act on them.
139. \_\_\_ Your school's leaders do not walk around with the attitude that they have all the answers.
140. \_\_\_ Your school's leaders are not threatened by "new" people and the positive impact that they could have on your school.
141. \_\_\_ You realize that a visionary long-range, strategic plan can only be created by leaders with vision.
142. \_\_\_ Your school has taken a strong stand **against** the following statement: "But we've always done it that way."
143. \_\_\_ Everyone understand the statement: "If you always approach a problem or situation the same way, you'll always end up in the same place.
144. \_\_\_ Your faculty and staff are willing to listen to new ideas and new concepts and then get excited and involved in them.
145. \_\_\_ Your development efforts are always seeking new ways to improve.

## HOW TO SCORE:

Give yourself 2 points for every **TRUE** answer; 1 point for every **SOMEWHAT** answer and 0 points for every **FALSE** answer.

YOUR TOTAL SCORE: \_\_\_\_\_

**250 - 290: Outstanding!** You have a great development effort that is involving people, creating new funding opportunities, and building a strong future -- all with the right components. Keep moving forward.

**210 - 249: Very Good.** You certainly have a fine effort in place and are headed in the right direction for the future. Take a strong look at those statements where you checked either FALSE or SOMEWHAT. Those are the areas you need to assess for future growth.

**170 - 209: Good.** Your school has put some key elements in place; hopefully, they are mostly in Assessment Areas # 1, 2, and 3. Go back and look at those statements where you checked either FALSE or SOMEWHAT. Those are the areas that you need to assess and improve in order to build a solid foundation for the future.

**120 - 169: Need Some Work.** Don't get discouraged. It may be that you are just beginning and your effort is just getting off the ground. If so, concentrate on Assessment Areas # 1, 2, and 3. Building the right foundation is half the battle. Try and rest a little easier knowing that beginning development the right way will keep you from "spinning your wheels" down the road.

**1 - 119: A Real Challenge.** Please refer to the above comments. Also, ask yourself this question: Did I give myself enough credit on the TFS Test?

### NOTE:

It is best to:

- take the TFS Test as a small group or committee, or
- have 8-10 people take it individually, then
- get together to compare answers and come up with a composite score.

It is not best to:

- have one person (president, principal, pastor, development director) take the TFS Test and only use that as the basis for assessment.

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