



January 2007

## ***Development Directions***

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

### **"Setting Up the Proper Infrastructure for Your Catholic Development Efforts"**

#### **Starting a Catholic Development Effort**

As we begin 2007, we realize that many Catholic institutions have a development office of some kind. It may be a small operation; there may be a full time development director, or the effort could simply be something that parish and school leaders are planning to get to in the future. Some of the reasons we have seen why development efforts begin are listed here:

1. There is a strong need to bring in more money and so the development office is set up, a person hired, and the emphasis is on conducting fund-raising events, involving alumni, launching an annual fund, churning out a quarterly newsletter, building the database, addressing the stewardship program, and concentrating on strengthening the image so as to attract more parishioners and also students.
2. The parish and/or school will hire someone who has experience, and that person will come in and "hit the ground running." Besides all of the above, the office will also concentrate on professional growth, possibly a capital campaign, engaging people, building an endowment, and setting up a planned giving effort.
3. The school has a strong need to launch a capital campaign to raise 7 or 8 figure money, and after going through that intensive process for 12–18 months, the establishment of a development office with a development director becomes a natural next step.

Obviously, there are other reasons, but here at ISPD these are the main ones we have seen over the past eighteen years.

#### **Establishing the Infrastructure**

It is important that the development effort be set up to succeed! Because of the

understanding by leaders (parish council, school board, parish staff, faculty and staff, PTO board, etc.) of what this development effort is supposed to accomplish, and little training for the person who is placed in charge of making it happen. In most cases, people just want to know, "How much money did you raise?"

Why not set up your development effort for the long term? Why go for the quick fix and have a development office that is nothing more than a glorified fund-raising program with event after event after event?

At the end of this article, there are Development Infrastructure reference charts for Catholic schools and parishes. Over the past 18 years, we have taught these organizational charts to hundreds of Catholic institutions throughout the country, and many of these schools and parishes have made excellent strides, using this infrastructure as their foundation. Let us look closer using the School chart as an example.

At some point in time, the "School Leadership" (principal, pastor, board, etc.) makes the move to set up a "Development Office" with a "Development Officer". In the beginning years, the "Development Office" may be nothing more than a 4' x 8' table in the principal's office. And, the "Development Officer" may be a volunteer, the principal, or a teacher who works at it part-time. Please keep in mind that this chart's intention is to show how to "lay down the footprint for success."

The good signs are when the "leaders" have made their decision to begin a formal, organized effort; an "office" has been established, and an "officer" is in charge. It is then time to put in place the most important group of people who will ever work with this effort – the "Core Team." This is a group of 15–18 people who are hand selected by the "school leaders" to work alongside the "development officer" in assuring that development is integrated into the life of the school. This "Core Team" is valuable, whether or not this is a new start or if your development "program" has been in place for years and years. The "Core Team" is the group of people who will help make it happen.

In the beginning months, the "Core Team" should concentrate on three items:

1. Educating all key leadership groups about what they plan to do and what Catholic school development is and is not
2. Setting up the database of key publics
3. Establishing a communication system via e-mails, newsletter, web site, etc.

While the "School Leaders", the "Core Team" and the "officer" are getting this started, they need to make sure that they live by one rule: ***Invite and engage 100 uninvolved people into your Catholic school development effort each year.*** These "uninvolved" people could be parents who have not stepped forward, alums who have not stayed in touch, parishioners who know nothing about the school, businesses in the community to whom you have never said hello. The list goes on and on. And, every bit of communication needs to have a personalized component to it. ***Please, invite them personally.***

You may be saying, "Invite them to what?" Listed on the chart, under "People Fuel" are six input vehicles, all the way from interviews to input sessions to cup of coffee meetings. In past newsletters, we have offered over 25-30 ways to invite and engage people. So, please keep in mind that "People Fuel" will be the key to future success. It will be the gas that will run your development engine.

Once you have the top three boxes under "School Leadership" in place ("Development Officer", "Core Team" and "People Fuel"), you are ready to create the

written Strategic Plan for Development. How long does it take to put these first three boxes and their elements in place? Most Catholic institutions accomplish this within 6-8 months.

With the top of the chart in place, the next step is to personally invite approximately 75-100 people to be part of a four meeting process known as the Development Advisory Board Process. (You can call this group whatever you wish; that is simply the name ISPD gives it). The Core Team will surface the names of the people, and we encourage that you use what we call the "60% - 40% rule." This suggests that 60% of the people you actually invite be uninvolved, and 40% of the people you invite be already engaged in the school in some capacity.

Once assembled, this large group is going to divide into smaller groups, and create action strategies under 6-8 Planning Areas that deal with Catholic school development. Some of the Areas listed in the chart are:

- Alumni growth
- Publications
- Public Relations
- Student Recruitment
- Annual Fund

Working through four meetings, this group of people (DAB) will actually create the draft, written Strategic Plan for Development. In other newsletters, we will show you how to make this happen meeting to meeting, but coming out of this effort you will then have the Plan to move your development efforts forward. What you will also find is that over 40% of the people who work with you on this effort will also stay on to help you implement the Plan. And yet, at the heart of it all are the "Development Office" and the "Core Team." They assure continuity, consistency and reality.

The SPD (Strategic Plan for Development), once prioritized, is usually "good to go" for 12-18 months, and then it will need to be revisited. When you revisit it, you will need to affirm the accomplishments, explore new Planning Areas and new action strategies, and set the Plan up for the next 12-18 months. In addition, you will need to invite 25-30 people from the first DAB, and the other 50-60 need to be uninvolved. By keeping the Plan refreshed, you also keep your efforts relevant, and most importantly, you keep people meaningfully involved, which is the heart and soul of a Catholic development effort.

- [Chart for Catholic School Development Infrastructure](#)
- [Chart for Catholic Parish Development Infrastructure](#)

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