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Development Directions

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

“Inviting People to Be Part of the Capital Campaign Team”

1. Capital Campaigns from a Development Stance

- Capital Campaigns are as old as the country, and they will continue to be a major source of philanthropic giving for many years to come. Run correctly, they are highly effective; they energize a Catholic institution, and they challenge everyone to do the very best they can do - in many areas.
- ISPD finds that there are two approaches to Capital Campaigns - one purely from a fund-raising stance and one from a development position. They are quite different. Those run from a fund-raising stance are quick, money-oriented, and over in a short period of time. The goal is simple: raise money. Period. The end. “Identify - solicit.”
- Capital Campaigns from a development position require much different strategy and philosophy. This is the approach that ISPD recommends and takes.
- Four major differences between the two:
 1. The development approach requires a strong base of people to help organize, make decisions, go on visits, and invite the gifts.
 2. The development approach is just as concerned with what happens years after the Campaign is over as what happens at the end of it.
 3. The development approach is built around people - meaningfully involving them in the mission, the vision, the goals and the case of the institution.
 4. The development 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 institution, and, together with many other people, build a dynamic vision for the future.

2. Inviting People: Why the Reluctance?

- Not everyone who is invited to play a role as a Campaign leader is ready to say YES right away. We usually hear three statements when people are not ready to commit:
 1. “How much time will it take?”
 2. “Will I have to ask for money?”

3. "Who is going to help me?"
 - With a Development Campaign, the key to success is built around TEAMS - "Together Everyone Achieves More."
3. **Clear Case - Good Organization - Excellent Leadership**
 - Most people, we find, are very receptive to work as a Campaign leader when the Case Statement is clear; there is a good organizational structure in place, and the leadership is solid.
 - The case for most Catholic campaigns is compelling because it touches the main areas that grow out of long-range planning.
 - Leadership is always a key component to bringing people on board. When people consider a role as a Campaign leader, they should realize that there are a number of individuals and groups who will back them up:
 1. Administration
 2. The Board
 3. The Development Office
 4. Campaign consultants
4. **Being Part of a Team**
 - As a Campaign leader, no one should be alone. The entire structure should be set so everyone will be part of a team. There are four people or groups that leaders should be able to turn to at any moment:
 1. The person(s) directly above them
 2. The Development Office
 3. The Administration
 4. The consultants
5. **Campaign Leader: What Am I Expected to Do?**
 - ISPD maintains that there are seven key tenets to being a successful Campaign leader. They are:
 1. Always positive, upbeat
 2. Responsible in carrying out your assignments
 3. Well informed about the case for the Campaign
 4. Excellent communicator - up and down the Campaign organizational chart
 5. Attend key meetings
 6. Well trained
 7. Financially participate before seeking anyone else's gift
6. **How to Ask People to Be A Campaign Leader**
 - Asking people to be a Campaign leader is no mystery; however, we have found several key points to be very important in inviting people to be part of the Campaign process.
 1. Make sure the very best person is doing the asking.
 2. Make sure there is a letter of invitation sent out from one or a combination of the above:
 - President, Principal, and/or Pastor
 - Board President
 - Campaign Chairs

This letter should invite people to be receptive to the invitation to participate.

3. Make sure you provide some type of literature to leave with the person (couple):
 - Invitation to Participate booklet
 - Case Statement
 - Video
 - Etc.
- Inviting people to be a leader over the phone or by direct mail are the least effective ways of extending the invitation.

- Try and extend the invitation in person - "eyeball to eyeball."
- It is not advisable to "gang up" on anyone, but it may be helpful - at times - if two people did the asking instead of one.
- ISPD has had great success in asking people to be Campaign leaders in a small group setting - someone's home, a luncheon meeting with several couples, a breakfast meeting at the parish or school with a small group of potential leaders.
- Many people need time to think about their decision; that is great. It might be advisable to invite anyone who needs further information to call the pastor, the principal, the president, the consultants, the Campaign chairs, etc.
- Also, there is nothing wrong with inviting people to come to an informational session to see what is going on and to ask further questions.

7. **When and Where to Ask People to Be A Campaign Leader**

- When to ask people is important. Because you want people to get involved in helping organize and implement the Campaign divisions, it is important to have the key information to hand them - Case Statement, Fact Sheet on the Campaign, job description, etc.
- Where to ask is important. If the "ask" is "on the run" people will not take it as seriously as if they were invited in a nice setting - someone's home, the pastor's office, a nice restaurant, etc. ISPD recommends that you try and get the person away from his/her office. This will get their mind off of business and allow for good conversation about the Campaign and their role.

8. **Why People Say "Yes" to Campaign Leadership**

- ISPD has had the opportunity to work with some of the finest Catholic leaders in the country. It is always interesting why some people get involved in Campaign leadership, and some elect not to do anything at all. We used to think that the time factor was the big hurdle for most people, but we have found that people who are busy actually make the best Campaign leaders. They are busy anyway, and one of the reasons they are successful is they have figured out how to organize their time. They are quite capable of getting the Campaign on their calendar and doing those tasks that are needed for success. So, don't let that one scare you.
- Don't make up someone else's mind. Often we see Campaign leaders considering other people for key jobs, and they will make the statement, "Oh, she will never do anything like this; she's way too busy." Our response? How do you know unless you ask?
- Some of the meaningful reasons people have said YES:
 1. The person doing the inviting extended the invitation person-to-person, and there was a strong relationship to begin with.
 2. People feel good about the institution and want to do everything they can to see it get even better.
 3. People see themselves as excellent contributors in the community, and volunteering (while expecting nothing in return) is part of their make-up.
 4. People feel that the institution did or is doing a great job for them, a family member, etc., and they want to show appreciation.
 5. Strong belief in the mission and the case
 6. Someone asked
 7. They feel part of a strong family and want to be part of something that is positive and visionary.

9. **Campaign Leaders: Their Financial Participation**

- As mentioned above, ISPD recommends that all Campaign leaders give their gift before they seek gifts from anyone else.

- The size of the gift is left up to the Campaign leader. Optimally speaking, people working with a specific division should be invited to give that level of financial participation.
- The key is thoughtful prayer and consideration.

10. **The Rewards of a Successful Campaign**

- There is nothing quite like a successful Campaign. It is exciting to be part of a team that made it happen, and to leave a legacy that will be remembered for many years to come.
- We find that the real rewards of a Campaign lie in the relationships of the people who worked and the people who gave. If development is *the meaningful involvement of people in the mission and vision of a Catholic institution*, then the Capital Campaign is one of the main vehicles to carry people into greater ownership and pride.
- When a Campaign does end, many times that is just the beginning of a stronger relationship between a Campaign leader and the institution's administration. Both have worked hard for many months, and as they stand on the top of the mountain and look out in the distance at what was so successful, they can truly say, "We did this as a team!"

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E-mail: ispd@bellsouth.net
 Phone: 800-299-2393
 Website: <http://www.ispd.com>

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