



October 2009

Development Directions

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

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Top 10 List for the Annual Fund

By Frank Donaldson, President

At this time of year, thoughts turn to the single most important Development \$\$\$ process that a Catholic institution can embark upon: The Annual Fund. Some Catholic schools and parishes have already kicked them off, and others are geared up for a Fall launch or a First of the Year invitation to all of their constituents. Regardless, the Annual Fund becomes the backbone for all Development \$\$\$ that come into the elementary school, the high school, the regional school, and/or the parish.

This past Monday, October 26, 2009, we hosted our monthly ISPD Webinar, and the October topic was on the Annual Fund. In the post-Webinar survey, there were a number of questions and comments from the many people who logged on. Because of that excellent and positive response we decided to answer some of those questions and reinforce some of those statements in two ways:

1. Devoting the October 2009 Development Directions newsletter to the Annual Fund; and
2. Hosting another Part II Webinar on the Annual Fund because 90% of the people who took the one on October 26th said they would be interested in delving further into the specifics of the Annual Fund.

We will be posting information about that Webinar on our web site and also will be sending an e-mail to all announcing when and what topics will be covered.

This newsletter zeroes in on what we believe at ISPD are the "Top 10" in terms of "must do" items for a successful Annual Fund. This allows us to focus on these points and encourage you to integrate them - when possible - into the Annual Fund process in which you are presently working

or will be working in the future.

1. **Invite Three Gifts.**

- As we have said many times, invite three gifts and not just one. We encourage you to invite the Gift of Prayer, the Gift of Service (Involvement) and the Gift of Financial Participation. In a Catholic institution, we believe it is important to make sure that Gifts of Prayer and Gifts of Service are invited; they become major "pillars" of our role as Catholic stewards.
- In order to do that, we suggest that you put that language on your Intention Card:
 - **Gift of Prayer**
 - ___ Daily, pray the Annual Fund prayer
 - ___ Participate in Adoration Chapel as an adorer
 - ___ Offer daily prayer for the realization of long-range vision
 - ___ Daily, pray the rosary
 - ___ Attend one extra Mass per week
 - ___ Other: _____
 - **Gift of Involvement/Service (Time, Talent, Wisdom and Expertise)**
 - ___ Annual Fund leadership - Specific Role _____
 - ___ Gifts of Expertise and Wisdom you wish to share:

 - ___ Host a reception for the Annual Fund
 - ___ Ambassador for the Annual Fund
 - ___ Help in the Development Office
 - **Gift of Financial Participation**
 - Financial Gift: \$ _____
 - Enclosed: _____
 - Divide into:
 - Monthly payments _____
 - Quarterly payments _____
 - Semi-annual payments _____
 - Annual payments _____

2. **Articulate Clear Case Points.**

- The most successful Annual Funds always have very clear "case points" on where the money will be going. We suggest that you not offer restrictive gifts, but that you list the 3-4-5-6 items that you wish to fund with the Gift of Financial Participation.
- Build a covered walkway, purchase new kneelers for the first 5 pews, fund the first year of the parish's Stewardship Office, purchase new microscopes for the science lab, and landscape the front entrance to the parish - these are all specific items to which people will relate.

3. **Invite Annual Fund Chairs and Associate Chairs.**

- We strongly suggest that your Annual Fund have a chair couple that will be in charge of this year's Annual Fund and an associate chair couple that will be in charge of next year's Annual Fund. People want to know who the leaders are.
- We like the couple configuration although it is not vital for success, but it does allow one of the spouses's to attend a meeting if the other is not available.
- Annual Fund Chairs do three things: Organize, Communicate and Motivate - and that is a lot.

4. **Move to "Eyeball to Eyeball."**

- Whenever possible, invite the gifts "eyeball to eyeball" and not through the mail or over the phone or on the web or through e-mail. Person-to-person will give you the best results.
 - One on one meetings, small group receptions in homes, receptions at the parish and the school, get-togethers in restaurants are all effective.
 - In many ways, your success will be determined by the number of people you personally invite "eyeball to eyeball."
5. **Recognize All Participants.**
- In your recognition methods, please make sure that ALL people who turned in their Intention Card are recognized - alphabetically.
 - The Gifts may be Prayer and/or Service and/or Financial Participation, but the bottom line is ALL people should be recognized and appreciated equally.
6. **Understand the Annual Fund as Part of the Development System.**
- As we have said many times, an Annual Fund needs to be one of the most important processes in the Catholic Development System. All of our Webinars, Workshops, and On-Site Consulting deal with this strong suggestion. By viewing development as a means to invite and involve and engage people in a meaningful way, your parish and/or school needs to reach out and engage people and invite them to offer their Gifts. That is a major objective of Catholic Development, and the Annual Fund is the perfect process to invite one of those three Gifts.
7. **Create a Division Structure to the Annual Fund.**
- An Annual Fund works well when there are two Chairs and there are chairs of each division of the process.
 - We invite you to consider the following divisions:
 - Major Gift Division
 - Leadership Gift Division (Board, faculty and staff)
 - Parent Gift Division
 - Parishioner Gift Division
 - Alumni Gift Division
 - Friends Gift Division (Past Parents, Grandparents and Friends)
 - Business Community Gift Division
 - New Parent/Parishioner Gift Division
8. **Measure Your Annual Fund.**
- Make sure there is an evaluation process each year for your Annual Fund, and we suggest not to be so quick to judge the Annual Fund on how many dollars were raised.
 - The Annual Fund should be evaluated and some key questions should be:
 - How much did our participation rate increase from last year to this one?
 - Did we retain 90%+ of our participants from last year?
 - Did we increase our participation by 15%+?
 - How many people offered the three Gifts?
 - Do we know why participants who turned in their Intention Card last year did not turn in one this year?
9. **Implement the Major Gift Division.**
- In terms of Gifts of Finance, the Major Gift Division is the most important. This division usually invites people who could possibly consider a Financial Gift of \$1,000+ each year.

- All of these should be "eyeball to eyeball" and as many as possible should suggest a specific amount - such as \$1,000+.
- You can have success in this Division if you do one-on-one work or host a Major Gift Reception or home reception or have the pastor-president- principal personally invite the gifts.
- In terms of dollars raised, it is not uncommon for the Major Gift Division to raise 60% or more of the total amount needed.

10. ***P-D-S-A: Plan-Do-Study-Adjust***

- At the heart of the tools of Total Quality Management is the P-D-S-A process. This stands for Plan then Do then Study then Adjust. As simple as it sounds, this takes a shift in culture to think like this.
- The first step is to PLAN. A written plan for the Annual Fund is a must.
- The second step is to DO. In other words, work the Plan.
- The third step is to STUDY. This means to carefully study, evaluate and assess the Annual Fund at year's end. Know what went well and what did not.
- The fourth step is ADJUST. In those areas that were not successful, adjust your plan. For those areas where you need to add new steps, then go ahead and do so. If your Annual Fund structure is ready, then create your written plan and DO it.

Obviously, there are other key tenets, but we feel these ten focus on the areas we believe will help you enhance or begin your Annual Fund.

ISPD 2010 Mardi Gras Development School

In case you haven't heard, we are bringing back the most popular three day workshop ISPD has ever introduced - ***the ISPD Mardi Gras Development School*** - which will be held at De La Salle High School on February 3, 4 and 5, 2010.

The ISPD Development School will have many advantages:

- At a Catholic high school located directly on St. Charles Avenue on the streetcar line
- Numerous hotels up and down the streetcar line where attendees can stay and simply ride the streetcar to De La Salle High School
- Over 15 courses on Catholic Development, Advancement, People Engagement and Total Stewardship
- Many presenters - ISPD associates and guest presenters from throughout the country
- Mardi Gras parades beginning the day the Development School is over
- Park bench sessions with presenters
- ISPD socials
- Networking luncheon
- Special Cajun/Creole outdoor cookout the night before - Tuesday, February 2nd from 6:00 PM - 9:00 PM - chartered bus service provided
- Plus much more

Make your plans, mark your calendar for a great time in New Orleans!

- [Learn More about the ISPD Mardi Gras Development School](#)

ISPD Announces New Webinar Series

ISPD now offers \$39 sixty minute Webinars on Catholic Development.

Listed here are our upcoming Webinars:

- "**Enrollment Management: Attracting and Retaining Students in Your Catholic School**",
November 18, 2009
- "**25 Ways to Engage People into the Life of Your Catholic Institution**"
December 8, 2009
- "**Organizing and Implementing the Total Stewardship Process**"
January 14, 2010
- "**How to Invite the Gifts**"
February 22, 2010
- "**Getting Your Parish and/or School Ready for a Capital Campaign**"
March 9, 2010
- "**Integrating Total Quality and Customer Service into Your Catholic Development Efforts**"
April 22, 2010
- "**Hosting a Gift Reception**"
May 5, 2010
- "**How to Effectively Host Input Sessions and Town Hall Meetings**"
June 8, 2010

- [Register for a Webinar Now!](#)

ISPD Announces Premium Plus Membership Plan

Because of the increasing demand for better direction in Catholic Development, Total Stewardship, and Enrollment Management, ISPD announces our **Premium Plus Membership Plan**.

A **Premium Plus Membership** provides unique access to a range of ISPD services and information delivered personally to you and your desktop. **Premium Plus** provides creative ideas, expertise and proven approaches/instruments designed to help address the challenges you face in your parish and/or school's Development/Advancement/Total Stewardship/Enrollment Management efforts.

Educational Webinars, personal conversations with an ISPD associate, assessment of your efforts, on-line monitoring with you and your Catholic leaders, and much more are all part of a **Premium Plus Membership** package, helping you achieve your goals in an effective, cost-

efficient way.

Premium Plus details and registration information are available by visiting our website. We're excited to offer this Plan and look forward to helping you with your efforts!

- [Learn more about our Premium Plus Membership Plan](#)

FALL 2009 WORKSHOPS

ISPD Workshops Delve into Depth

The one and two day workshops presented by ISPD offer Catholic leaders throughout the country an in-depth experience on a specific topic. For more than twenty years, ISPD has been this country's leader in offering process-driven workshops that are practical, affordable, and interactive. 98% of all ISPD workshops receive a rating of 4 or 5 (out of a 1-5 rating system) by those in attendance.

Fall Workshop Schedule

Long Range Strategic Plan
November 3rd in Lafayette, LA

Long Range Planning for Catholic Parishes & Schools
November 18th in Chicago, IL

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. Contact us for details.

- [Check Here for More Information on ISPD Development Workshops](#)

Visit our ISPD Web Site for Free Resources

- Educational DVDs on Catholic Development
- Development Job Postings across the country
 - Monthly Newsletter Archives
 - Library of Development Articles

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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.

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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.

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