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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 I Introduction, Rationale & Questions to Answer

By Frank Donaldson, President

NOTE: This newsletter is an excellent tool for you to use for discussion with the parish council, the parish and/or school staff, the school board, and other parish and school leadership groups.

I. Introduction and Rationale

- There are many reasons why parishes and schools initiate a development effort, and a lot of those reasons center around the word "money." Now, that is not altogether wrong; however, when "money" becomes the central and only focus of the development office and officer, then sooner or later the effort is going to turn into planning one fund-raiser after another.
- At ISPD, we strongly believe that the fund-raising part of development should not be the central focus. Financial resources certainly play a part in development, but they should not be the only reason a development office is opened up for business.
- ***Development is the meaningful involvement of people in your mission and vision for the future.*** This is the definition that defines it all. Through meaningful involvement, relationships build and the bonds between people grow stronger. It is the role of the pastor, the president, the principal, the development director, and parish/school leaders to identify, inform, invite and involve people every day into the life of the school and/or the parish. That becomes the theme that makes the difference.
- Unfortunately, many development efforts are born because there is a shortfall in the budget, and the first 2-3 years are spent holding one fund-raiser after another. There are candy sales and auctions and raffles and fairs and festivals and golf tournaments and Las Vegas Nights and walkathons and car washes and Easter bunny rabbit sales and magazine sales and calendar sales and bingo and dinner/dances and on and on. Once this

pattern begins, it becomes hard to break, simply because the finance committee depends upon that money to balance the books.

- There are two key definitions that are important in order to understand our ISPD philosophy:
 1. **Fund-raising dollars:** This is money generated from the fund-raising events - for example, some of the ones listed above. There is a "buy and sell" mentality here. I will buy a raffle calendar and you will sell me one. I will buy a bingo card and you will sell me one or two or more. I will buy raffle tickets and you will sell me some. What is important to understand is this: what motivates me to buy those bingo cards is what I will get in return. It makes no difference if I believe in your mission, your vision, your plan or anything about your parish and/or school. I simply want to win at bingo.
 2. **Development dollars:** This is philanthropic giving. I expect nothing in return. I give through the joy of giving or because I want to make things better, or because I believe in a cause or a strong case. This is the Annual Fund Drive, the Capital Campaign, the planned gift, the Endowment Fund, the memorial gift, the charitable remainder trust, the major gift to fund the science lab or pay for a stained glass window. In order to give development dollars, I need to believe in the leadership, the vision, the case, and the plan for the future. I need to feel involved and engaged.
- For those schools/parishes that want to move in that direction, we advocate a process that addresses how to move from fund-raising to development. This does not happen overnight, and it will take a lot of education, communication and understanding. However, if your school/parish is in it for the long-term, then development is the right road to travel and the meaningful involvement of people is the fuel that will get you there.

II. Key Questions to Answer

1. **Why was the development effort started at your parish/school?**
ISPD Perspective
 - This is the first important question to honestly answer. Who began it and why was the development effort begun? If it was just for money, then you need to be willing to say that. There is nothing wrong with the truth.
2. **Who is responsible for the implementation of the development efforts?**
ISPD Perspective:
 - The person and/or people in charge of your development efforts must understand why the efforts were begun. Is this the pastor, the president, the principal, the development director, a parent committee, a core team?
 - When this person and/or group does implement the development initiatives, it will be important that they understand the next question.
3. **Does the leadership understand the difference between development and fund-raising?**
ISPD Perspective:
 - It will be important to in-service and educate the leaders on the difference between development and fund-raising. After reading the Resource Section on our website (www.ispd.com), you may be able to do it. Or, as you look at some ISPD literature you may opt to have one of our associates come on your site and conduct a workshop for your leaders.
 - They do have to understand what direction the development efforts should be taking.
4. **Does the development effort have to raise a certain amount of money in order to balance the budget each year?**
ISPD Perspective:
 - This too is a key question. If you must raise a certain amount of money each year

from development efforts, then you may be painting yourself in a corner. By that, I mean, you may be forcing the development office to assume a fund-raising mode 100% of the time. If that is the case, then you will never be able to move into inviting and engaging people in your efforts. Everything will be built around events and buying and selling and not around building relationships.

5. How many fund-raisers does your school/parish conduct? Please name them.

ISPD Perspective:

- It will be important to name the fund-raisers - small and large - that your parish/school is involved in. List not only the ones that are sponsored by the school/parish, but also the ones that are sponsored by all organizations, clubs, teams, and departments.

6. What kind of approval process is in place for a team, group, organization, club, or class to hold a fund-raiser?

ISPD Perspective:

- Oftentimes, there is no master calendar or master plan for fund-raisers, and when a group wants to do one, they simply ask the pastor and/or the principal, and they do it.
- The problem with this is that if a donor is planning on giving a \$1,000 gift to the Annual Fund Drive, and his daughter asks him to buy five raffle calendars at \$50 each for the cheerleading squad, then he may purchase the calendars, and forego any philanthropic gift to the Annual Fund. In other words, he may be saying, "I already gave."
- There must be a limit, and there must be a process in place in order for a parish/school to get a "grip" on the many fund-raisers.

7. Does it seem that development efforts move from one fund-raising event to another?

ISPD Perspective:

- We talk with many development directors who go from one event to another. They are so busy printing tickets, organizing a planning committee, or seeking prizes, or booking rooms, or designing programs, or juggling one or two other fund-raisers, there never is any time to do development.

8. Do your parents/parishioners feel like they are being "nickel and dimed" to death?

ISPD Perspective:

- You simply will not get the philanthropic gift if all you do is have your hand out seeking another two liter coke or another set of raffle tickets or another fee to assess or another envelope collection.

9. If you have a development director would it be best to call that person Director of Fund-raising Activities?

ISPD Perspective:

- If you are going to call your development director a development director, then please don't have that person spend the majority of his/her time conducting fund-raising events.
- If the person is going to do that then be honest. Call it like it is. Simply say that the person is Director of Fund-raising Activities.

10. How important is it for your school/parish to move from fund-raising to development?

- **Very Important**
- **Important**
- **Not very important**
- **NA**

ISPD Perspective:

- This is another one of those "be brutally honest" questions. If the leadership of your school/parish simply wants to generate \$100,000 per year through six key fund-raisers, then so be it.
- However, if you are serious about moving into an integrated development process, now is the time to begin, and listed in our next newsletter are the steps to follow.

ISPD 15 MIN Educational DVDs on Catholic Development Free upon Request

- ***An Introduction to Long-Range Planning for Catholic Parishes***
(available now)
- ***An Introduction to Long-Range, Strategic Planning for Catholic Schools***
(available now)
- ***An Introduction to ISPD's Total Stewardship Process***
(available now)
- ***Creating the Strategic Plan for Development for Parishes and Schools***
(Available now)
- ***Inviting, Involving, and Engaging More People into the Life of Your Catholic Parish***
(available now)
- ***Getting Ready for a Capital Campaign, Part I***
(coming October 2008)
- ***Implementing a Capital Campaign, Part II***
(coming November 2008)

To receive your free 15 minute DVD, please visit the [Resource Center](#) on our website.

ISPD OFFERS FREE SERVICE: A Place for You to Announce Job Openings in Catholic Development, Advancement and Total Stewardship

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

ISPD is your Catholic School Enrollment Solution for maintaining and/or increasing the quantity, quality, or diversity of your elementary or secondary Catholic school enrollment. *Catholic School Enrollment Talk* is our free monthly online newsletter for anyone interested in Catholic school enrollment solutions.

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FALL 2008 WORKSHOPS

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We hope you'll join us!

Topics Include:

- ** Annual Fund **
- ** Become a More Welcoming, Engaging & Affirming Catholic Parish **
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- ** Capital Campaigns That Produce Results **
- ** Catholic School Enrollment Solutions **
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- ** 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

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.

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

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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.

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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