

CATHOLIC DEVELOPMENT + QUARTERLY +

An informational DIGEST to guide development personnel in the emerging field of development.

Volume XI, Edition 1

ASSESSING YOUR DEVELOPMENT PROGRAM: TESTING IT AGAINST CRITERIA

For more than 10 years, in this publication, we have endeavored to serve our members by enhancing their awareness, supporting their skills and stimulating their development efforts. Often times, it is difficult to self evaluate and others may not have a clear understanding of a good development program to provide evaluative criteria. Our firm, through its consulting services/division provides dozens of on-site Initial Development Assessments each year for Catholic institutions nationwide.

This edition of the +*QUARTERLY*+ is dedicated to focusing on the assessment process by offering criteria, systems and a "checklist" to test your development program. As is true in any organization, things never stay the same. They can only move forward or move backward.

Essentially, a Catholic institutional development program can look to five criteria to test the quality and effectiveness of its efforts:

- UNDERSTANDING AND APPRECIATION.
- LEADERSHIP AND VISION.
- PHILOSOPHY AND PROFESSIONALISM.
- DEVELOPMENT COUNCIL.
- QUALITY DEVELOPMENT FUNCTION

CRITERION #1: UNDERSTANDING AND APPRECIATION

Development is one of those ambiguous terms that, if misinterpreted, can create confusion and mistrust as well as a lack of understanding. Our firm defines development "as a management strategy that enables Catholic institutions to achieve their mission and goals through a program of planning, public relations and charitable giving concepts."

Therefore, all publics of the institution need to appreciate that development is an integral part of the institution-not just an "add on" to bring in extra money or to pay a few bills.

Development is tied to the very essence of the institution and its reason for existence.

The development program and direct financial support becomes a means of "testing" the validity of the Catholic institution's mission. In essence, the development program and specifically gift giving allow the institution to come full circle.

It is critical to the future of the Catholic institution as well as to the success of the development program that the institution as a whole understand and support the development program with an appreciation for its ties to the unique mission of the institution. Your donors and outside publics will have that view and therefore it is essential that your internal publics (boards, committees, staff and administration) have the same appreciation and understanding as well. The following set of questions would assess the level of Understanding and Appreciation for the development program.

- Does the institution have a standing Development Council that can champion the development program and influence other boards and committees?
- Does the chief administrator convene the Development Council?
- Does the Development Council enjoy a status of credibility inside the institution as an influential component in the management and governance structure of the institution?
- Does the development office work exclusively in the development area or are other tasks assigned to the office: fundraising (bingo, raffles, festivals, photo album project, etc.)?
- Does the institution encourage and receive non-cash gifts (stock, land, bonds, shares in mutual funds, etc.)?
- Does the visioning, self study and strategic planning process ultimately link itself to the development program?

CRITERION #2: LEADERSHIP AND VISION

Successful development programs have one thing in common: administrative and volunteer leadership that shares a compelling vision with others. From that point of leadership, development success follows. Vision is so vitally important to the development program. Administrative leadership will make a major difference.

Characteristics to look for in administrative and volunteer leadership:

- clear vision where the institution should be going.
- strong belief and effective articulation of the Catholic identity principles.
- leadership facilitates and encourages the development program; not abdicated to staff.
- development is an integral of the institution's mission and operation replete through the visioning, planning, self-study and implementation process.

It is essential that the administrative leader and board leaders devote a percentage of their time to the development program. It should be published as part of job descriptions and published institutional goals of the board. Many institutions have re-focused the functions of the administration to include the "President/Principal" concept. The president focuses on the visioning, Catholic identity and development efforts, which includes working with the development officer. The principal's function is directed towards the day to day operation, personnel issues, evaluation, facilities, etc.

CRITERION #3: PHILOSOPHY AND PROFESSIONALISM

This particular criterion may be the most critical and it is certainly most reflective of the first two criteria established heretofore. A development program that is held in high regard and supported by the Catholic institution's leadership, will develop a philosophy and level of professionalism that will create an environment where the program will flourish.

We suggest that a development program articulate a philosophy that will, in turn, create a set of assumptions on which to build a long term, effective program. A sample development philosophy statement could read as follows:

"The development program at Cathedral holds that its mission is of value and worthy of financial support. Development is a ministry which allows people to express their faith through the faith response of offering their financial gifts. It is also our mission to help educate people how to express their faith through giving. Those financial gifts will also allow Cathedral to carry out its mission. We also hold that it is a privilege to ask and a privilege to be asked to carry out the mission of the Church here at Cathedral."

A clearly understood philosophy will advance both a well-respected and fairly aggressive development program. Within that philosophy are a number of very practical assumptions:

- it is both good and noble to ask and be asked.
- development is a ministry.
- development is "a management strategy" that is inherent in the Catholic institution and central to its future.
- it is not a quick fix, fundraising, stopgap measure.
- large donors influence development philosophy.

It is important to accept and understand that, in many cases, implementing a development program is also changing the culture. When you change the culture, you will get resistance and criticism. The charge "You're always asking for money!" will be heard during the change of culture and even afterwards. Remain stalwart and those changes will become traditions as you "condition" donors to give in different ways.

CRITERION #4: DEVELOPMENT COUNCIL

As we have stated in the past, the single most effective element in the development program is the Development Council (**The Development Council**). Men and women of faith, influence and affluence serving as subcommittee heads of your Development Council will make a significant difference. The development officer serves as executive staff of the Council. His or her function reflects the work or subcommittee structure of the Council:

- Annual Fund.
- Major Gifts/Campaign Follow Up.
- Planned Gifts.
- Memorials.

- Donor Relations/Marketing.
- Corporate/Foundations Gifts.

This committee would be active and involved in attracting major gifts to the Catholic institution through their participation on the Development Council.

CRITERION #5: QUALITY DEVELOPMENT FUNCTION

Our work providing Initial Development Assessments to Catholic institutions throughout the United States directly enhances the quality of the development program. We assist in the continued professional education and productivity of the development office. Often times, so much "counsel," much of it well meaning but incorrect, is directed toward the development program. Much of that advice and counsel comes from internal publics which make it difficult reconcile. The most effective development programs are the ones that engage development consulting on an ongoing basis.

Our work is directed toward the function of the development program:

- Does function reflect the stated goals?
- Are calls being made?
- Are efforts being directed toward major gifts?
- Is leadership involved and supporting the development program?
- Are efforts directed toward planned gifts and gifts of assets -- remember 90% of all wealth is held in assets (the government treats these gifts more favorably within the current tax code)?
- Are board and volunteers growing in their understanding of development?
- Are management procedures, efforts and software endeavors lending themselves to greater donor research and cultivation?

Our Assessments provide an outside "voice" and perspective that won't come from the internal reaches of your institution. We look for these criteria to grow and advance this important ministry within your Catholic institution.

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