

EVALUATING THE EFFECTIVENESS OF YOUR DEVELOPMENT EFFORTS

True - False - Somewhat Test (TFS Test)

*Please write **T** if the statement is **True** for your parish/school, **F** if the statement is **False** for your parish/school, and **S** if the statement is neither all **True** nor all **False**. In other words, it is **somewhat true** and **somewhat false**. Please write **NA** for **not applicable**.*

Assessment Area # 1: Development Principles

1. ___ Even though you may not have a formal effort, you do recognize the need for development in your parish/school.
2. ___ Your internal publics (finance committee, administration, faculty, boards) understand that development is not just fundraising.
3. ___ The development effort is being run with complete integrity.
4. ___ You do realize that development is a whole new way of looking at things.
5. ___ One of the topics for discussion at your parish council/board meetings is in the area of development.
6. ___ Your parish/school has a clear mission statement that is shared with all key internal publics.
7. ___ Your parish/school does have a long-range, strategic plan of some kind in place.
8. ___ The reputation of your parish/school is top notch.
9. ___ The pastor and/or principal understands the development process and supports the efforts.
10. ___ Your parish/school leadership operates under the principle: "In order to make money, we've got to spend money."
11. ___ Your development effort is making progress year-to-year and the yardstick of measurement is the following:
 - Involvement of people
 - New approaches to old problems and situations
 - New money from new publics
 - Creativity

- Further understanding of the marketplace
12. ___ Your development effort concentrates heavily on cultivation of people.
 13. ___ You are always looking to involve people from a Win-Win Position by answering the question: What's in it for them?
 14. ___ Your development effort is pro-active and not re-active.
 15. ___ Your development effort is done just as much person-to-person and in small groups rather than just on paper and through direct mail.

Assessment Area # 2: Development Organization and Structure

16. ___ You do know the various "publics" who make up your parish/school and who is capable of giving time, talent and \$\$\$.
17. ___ Your database is up-to-date on the following publics:

Internal

- Administration
- Parish leaders
- Faculty/Staff
- Internal Boards and Committees
- Students

External

- Parents
- Parishioners
- Alumni
- Grandparents
- Parents of alumni
- Businesses
- Feeder sources

18. ___ Through fund-raising efforts, you have been able to identify who is capable of helping you financially.
19. ___ There is an organizational chart in place that shows the relationship of development to the rest of the parish/school.
20. ___ There are clear job descriptions in place for those people working with the development efforts.
21. ___ Your development effort has one of the following configurations:

- Full-time development director
 - Part-time development director
 - Volunteer development director or committee
 - Consultant and volunteers
 - Consultant and paid part-time or full-time development director
 - Development Team
22. ___ You have a formal budget for the development department.
23. ___ You do see the value of a professional development audit done by an outside firm that can objectively assess your situation, tell you what the strengths and weaknesses are, and then make recommendations for future growth.
24. ___ The development director is considered part of the administrative team.
25. ___ The people involved in development have attended one or more professional workshops in order to receive proper training in this field.
26. ___ You have begun to build a library of professional reading materials on development.
27. ___ You have adequate office space and the necessary "tools of the trade."
- Computer
 - Good software
 - Telephone
 - Fax/modem
 - Filing space and cabinets
 - Access to good copy machine
 - A budget
 - Work space
 - Good volunteer help
 - Good location of the office in the parish/school
28. ___ You have looked for ways to collaborate with other Catholic schools in your area.
29. ___ You have conducted key attitude/image/interest surveys with some of the following markets:
- Parishioners
 - Students
 - Faculty/Staff
 - Parents
 - Parish/school leadership
 - Alumni

- Feeder sources
- Community leaders
- Pastors/principals

30. ___ Your development personnel (paid and/or volunteer) are members of one or more professional development organizations:

- A local collaborative group in your area
- NSFRE (National Society of Fund-Raising Executives)
- NCDC (National Catholic Development Conference)
- CASE (Council for the Advancement and Support of Education)

31. ___ You have over 100 people meaningfully involved in your development effort on an annual basis through some of the following means:

- Input Sessions
- Development Advisory Board
- Planning Teams
- Alumni Development Board
- Blue Ribbon Committee
- Annual Fund Cabinet
- Capital Campaign Cabinet
- Case Statement Committee
- Parent Ambassador Team
- Alumni Ambassador Team

32. ___ You clearly understand the percentage of time that you should spend with each area of development.

33. ___ You know where you want the development effort to go over the next five years.

34. ___ Staff members are invited to hand in Wish Lists each year to let you know what they need -- big and small.

Assessment Area # 3: Internal Marketing

35. ___ The staff understands the development process and support it.

36. ___ You have in-serviced all key internal publics:

- Parish Council
- School Board
- PTA leaders
- Leadership Boards and Committees

37. ___ There is some kind of regular communication to all internal publics in regards to what is happening with the development effort.
38. ___ Staff members have been given opportunities to get involved in the development effort and some are participating.
39. ___ Staff members have been invited to input into the mission statement.
40. ___ Internal publics are involved in the recruiting effort.
41. ___ Internal publics (the messengers) clearly understand the mission (the message) of your Catholic parish/school and speak about it in a positive manner.
42. ___ Your internal publics understand the parish/school's history, heritage, and unique qualities.

Assessment Area # 4: Public Relations

43. ___ You have clearly identified all the key publics with whom you want to relate, and you have strategized ways in which to reach these people.
44. ___ The person who answers the phone at your parish/school is polite, cordial and treats the call with utmost courtesy.
45. ___ Receptionists have been trained on how to answer the phone at your parish/school and what to say and what not to say.
46. ___ Your parish/school does send in news releases to area newspapers on a regular basis.
47. ___ Visitors are welcomed with politeness when they enter the parish office/school.
48. ___ The bulletin boards within the parish/school are decorated with positive messages that reflect the mission.
49. ___ Parishioner, parent, student and staff concerns are met with immediate attention and concern.
50. ___ The pastor/principal projects a positive image -- one that shows a person who does have time for others.

51. ___ Students are recognized for achievement -- both inside the classroom and out.
52. ___ Your school participates in Catholic Schools' Week and uses this time for excellent public relations.
53. ___ The grounds are clean; the grass is cut, and your parish/school projects a clean-cut image.
54. ___ There is parking available for visitors.
55. ___ Students understand the value of having their uniform neat and clean.
56. ___ Staff members and administration reflect a professional image by the way they dress, speak and appear.

Assessment Area # 5: Publications/Communications

57. ___ Your parish/school has a clear logo or visual image that is recognized and accepted by all.
58. ___ There is one person that "clears" all publications leaving the parish/school.
59. ___ You have clearly identified those 1-15 words that clearly describe your parish/school and what you are all about.
60. ___ The image your publications are projecting is the type of image you want to project?
61. ___ You have involved professional expertise to help with your publications and communications.
62. ___ You do put together an excellent Open House each year for the school.
63. ___ You do have many ways in place for potential students and parents to come on your campus for activities.
64. ___ You have an excellent way to welcome new parishioners into the parish.
65. ___ You have been able to communicate the fact that your parish/school has unique qualities and is here to stay.

66. ___ You are putting a formal communication process in place:
- Pocket folder
 - Profile Sheet
 - "All Publics" newsletter (The Quarterly)
 - Brochure
 - Ministry booklet
 - Case Statement
 - Annual Report
67. ___ You have an Annual Report in place that lets people know what is done with the money they have invested in your Catholic parish/school.
68. ___ You are working on a Case Statement for your parish/school that clearly shows where the parish/school has come from, where it is, where it is going, and the many ways people can invest in the parish/school's future.
69. ___ You do use your publications to involve the alumni in their school.
70. ___ You have a quarterly newsletter in place.

Assessment Area # 6: Recruiting/Retention at Your School

71. ___ Your recruiting effort is built around the word **need** -- the need of a student to find a school that will develop his/her academic and personal potential, and the need of a school to replenish its ranks with students who respond to the kind of institution it chooses to be.
72. ___ You do know what your potential students really want.
73. ___ You do know how you can deliver better than the competition.
74. ___ The entire school is in constant "marketing mode."
75. ___ You understand the demographics and economics of your geographical area.
76. ___ You have a clear prospect list that is consistently updated.
77. ___ Your recruiting effort is evaluated -- objectively -- at least every two years.
78. ___ You do have some kind of organization in place to recruit new students.

79. ___ You do have some kind of retention program in place to retain the present students you already have.

Assessment Area # 7: School Alumni

80. ___ You have a good database of alumni names/addresses/phone numbers.

81. ___ Your alum base has been receiving good communications from you on a regular basis.

82. ___ You have an Alumni Association with dues paying members.

83. ___ You have social events in which your alums may participate.

84. ___ You have a class representative system in place.

85. ___ You have an alumni board that oversees and provides input into alumni activities.

86. ___ Former faculty members are invited to reunions.

87. ___ You are involving your alumni on campus with regular activities -- for example, Career Day, Homecoming, Open House, etc.

Assessment Area # 8: Volunteers

88. ___ You do have volunteers who are willing to work with your parish/school's programs.

89. ___ You do have people on your parish council/school board and involved in your parish/school organization who are "movers and shakers."

90. ___ Your volunteers are thanked on a regular basis.

Assessment Area # 9: Special Event Fundraising

91. ___ Your parish/school is involved in some kind of fund-raising throughout the year.

92. ___ The fund-raisers and the development effort are not "stepping on each other's toes."

93. ___ Your special event fund-raisers are doing two major things: building friends and making good net dollars.

94. ___ Your parish/school is not spending too much time on special event fundraising -- at least not to the point where you are "burning people out."

Assessment Area # 10: Annual Fund Drive for the School

95. ___ You realize that the Annual Fund is usually the first step toward development \$\$\$.

96. ___ You realize that the Annual Fund is a coordinated, concentrated effort on the part of the school to plan one major, professional effort which can produce better results than a lot of "nickel and dime" efforts.

97. ___ You realize that you must have a strong case for the Annual Fund, telling people exactly where the \$\$\$ is going to go.

98. ___ There is a written plan that explains the Annual Fund for everyone.

99. ___ You realize that a successful Annual Fund cannot be run primarily through direct mail.

100. ___ You have involved and communicated with enough people to run a successful Annual Fund each year.

101. ___ Your Annual Fund is set up to run like a "Mini-Campaign" -- with an Annual Fund Cabinet, division chairpersons, major gift component, clear case points of what will be done with the money, etc.

102. ___ You have built a strong telemarketing component into the Annual Fund.

103. ___ You are applying the rule of 1/3's: 15-20 people will give 1/3 of the money; 75-100 people will give 1/3 of the money, and the rest will give the last 1/3 of the money.

104. ___ The number of donors -- each year -- keeps increasing by 15%.

105. ___ The amount of money -- each year -- keeps increasing by 10%.

Assessment Area # 11: Major Gifts

106. ___ You have identified your "Top 100" list of potential donors who are capable of giving a gift of \$1000+ each year to your parish/school.
107. ___ You have put together a Blue Ribbon Committee of 15-20 people who can help you further identify your "Top 100" list.
108. ___ Twice per year you are meeting to update your "Top 100" list.
109. ___ You understand that the best solicitation occurs when the right prospect is asked by the right solicitor at the right time for the right amount; therefore, research is important.
110. ___ People from your parish/school who are involved in major gift work have been trained properly in what to do and say.

Assessment Area # 12: Business/Community Outreach

111. ___ You have begun some kind of community outreach in order to get community/business leaders on campus.
112. ___ You have identified those businesses that would have an interest in your school and your mission.
113. ___ You have or are in the process of designing programs for these businesses to get involved with in your school.
114. ___ You have business leaders involved on your Development Advisory Board -- not just those who are parents and alums but others who have no direct tie to the school.

Assessment Area # 13: Grantsmanship

115. ___ You are familiar with the concept of grantsmanship.
116. ___ You have identified some foundations, corporations, and/or government agencies from which to seek funding.
117. ___ You realize that grant writing is not successful when done as a "shotgun" approach.

118. ___ You have attended workshops and gotten training in the art and science of grantsmanship.

119. ___ You have created a "Wish List" from administration and faculty in order to identify those areas where you could seek funding.

120. ___ One or more specific persons at your school is designated as the grant writer.

121. ___ Your school has received a grant within the past 12 months.

Assessment Area # 14: Endowment

122. ___ You have begun to build an endowment.

123. ___ Your endowment effort is set up as a separate foundation with its own corporate structure and board.

124. ___ Your endowment growth is through major gifts and/or a % of the Annual Fund and is primarily built with selected major donors.

125. ___ Your parish/school leadership is actually making a commitment to endowment and not just paying "lip service" to it.

Assessment Area # 15: Memorial Gifts

126. ___ You have a formal memorial gifts program in place.

127. ___ You have a nice brochure that explains the many opportunities for people to make a memorial gift through the parish/school.

Assessment Area # 16: Capital Campaign

128. ___ Your parish/school leaders do recognize the value of a capital campaign every 8-10 years in order to construct new buildings, renovate existing ones, and/or build endowment.

129. ___ Your parish/school leaders understand how the Capital Campaign fits into the overall development effort.

Assessment Area # 17: Planned Giving

130. ___ You do have a basic understanding of Planned Giving and realize that this is an area that can become a very important component of your development effort.

131. ___ You are using your newsletter to explain Planned Giving opportunities.

132. ___ You have considered offering a Wills Clinic at some time in the future.

133. ___ You have identified those people who have expertise in planned giving.

134. ___ Your parish/school has a tax attorney who can advise the parish/school and donors of the many options of a Planned/Deferred Giving Program.

135. ___ Your parish/school has identified those potential donors who may have an interest in Planned Giving.

136. ___ Your development officers have received the necessary training in order to understand Planned Giving -- from the parish/school's perspective.

137. ___ Your parish/school has gathered the important Planned Giving literature that is available in order to form a library of materials.

Assessment Area # 18: The Magic of Creativity

138. ___ Your parish/school's leaders are willing to listen to new ideas, new concepts, and new dreams -- and then act on them.

139. ___ Your parish/school's leaders do not walk around with the attitude that they have all the answers.

140. ___ Your parish/school's leaders are not threatened by "new" people and the positive impact that they could have on your parish/school.

141. ___ You realize that a visionary long-range, strategic plan can only be created by leaders with vision.

142. ___ Your parish/school has taken a strong stand **against** the following statement: "But we've always done it that way."
143. ___ Parish/school leaders understand the statement: "If you always approach a problem or situation the same way, you'll always end up in the same place."
144. ___ Your staff is willing to listen to new ideas and new concepts and then get excited and involved in them.
145. ___ Your development efforts are always seeking new ways to improve.

HOW TO SCORE (if all the statements applied to you)

Give yourself 2 points for every TRUE answer; 1 point for every SOMEWHAT answer and 0 points for every FALSE answer.

YOUR TOTAL SCORE: _____

250 - 290: Outstanding! You have a great development effort that is involving people, creating new funding opportunities, and building a strong future -- all with the right components. Keep moving forward.

210 - 249: Very Good. You certainly have a fine effort in place and are headed in the right direction for the future. Take a strong look at those statements where you checked either FALSE or SOMEWHAT. Those are the areas you need to assess for future growth.

170 - 209: Good. Your parish/school has put some key elements in place; hopefully, they are mostly in Assessment Areas # 1, 2, and 3. Go back and look at those statements where you checked either FALSE or SOMEWHAT. Those are the areas that you need to assess and improve in order to build a solid foundation for the future.

120 - 169: Need Some Work. Don't get discouraged. It may be that you are just beginning and your effort is just getting off the ground. If so, concentrate on Assessment Areas # 1, 2, and 3. Building the right foundation is half the battle. Try and rest a little easier knowing that beginning development the right way will keep you from "spinning your wheels" down the road.

1 - 119: A Real Challenge. Please refer to the above comments. Also, ask yourself this question: Did I give myself enough credit on the TFS Test.

NOTE:

It is best to:

- take the TFS Test as a small group or committee, or
- have 8-10 people take it individually, then
- get together to compare answers and come up with a composite score.

It is not best to:

- have one person (president, principal, pastor, development director) take the TFS Test and only use that as the basis for assessment.