

January 2018



A Christian Steward is:
One who receives
God's gifts gratefully,
cherishes and tends them
in a responsible and
accountable manner,
shares them in justice
and love with others,
and returns them with
increase to the Lord.

WISDOM

from ICSC strategic partners

This month's contributions come from the following ICSC Strategic Partners:



DIOCESAN

Our Sunday Visitor



Each month ICSC sends you practical information, whitepapers, and tips, as well as other insightful information from our Strategic Partners to assist you with your responsibility as stewards of the Church. We are very grateful to our Strategic Partners for their partnership and commitment to ICSC, and their professional wisdom is a wonderful gift to ICSC members.

In this edition ICSC provides for you:

- * next steps after completing a feasibility and planning study offered by **CCS**.
- * four things Blessed Alberione teaches us about communication courtesy of **Diocesan**.
- * ways to create and finish goals in 2018 shared by **Our Sunday Visitor**.
- * three dirty secrets to clean data from **ROI Dataworks**.

For additional information and resources from our strategic partners visit the ICSC website at:

<http://catholicstewardship.com/our-partners/strategic-partners/>

ICSC promotes and supports Catholic teaching on stewardship by providing education and resources for dioceses, parishes, and institutions of the Roman Catholic Church.

You Just Completed a Feasibility and Planning Study: Now What?



We partner with nonprofits for **transformational** change.

by Eliza Huleatt, CCS Vice President

January 2018

A successful feasibility and planning study will educate parishioners about the impact of their philanthropic investments, provide recommended goals, reveal potential volunteer and financial prospects, and most importantly, tell you if your Catholic institution is ready to move forward with a major fundraising initiative. This information is essential to charting next steps.

If you have recently completed a feasibility and planning study, get ready – the work is not over! Whether you have decided to move forward with a campaign or take more time to think about your goals, there are several essential tasks to complete before wrapping up the study phase.

Remember to say thank you

This is perhaps the most important step. Remember that many people shared their time and advice during the study, most notably your donors. Even if you expressed gratitude to your participants throughout the study, take time at the close of the study to express it yet again. Also, don't forget to thank all of the staff members who pitched in to make the study a success.

Update your study participants — even if there is no concrete update

Everyone you invited to participate in the study is expecting to hear the results. You don't need to share your decision-making process with all participants, but do take the time to let them know that the study has come to a close, the objectives were met, and your institution is now thinking about next steps. Remind participants that they are important to the process and as "insiders" will be kept in the loop.

Digest what you have learned

The study should have revealed valuable information about your institution, and its fundraising potential. Take the time to think about these critical elements, ask questions, and gather more information if necessary. Pay attention to:

■ **Timing.** Is now the right time for your institution to embark on a major initiative? What other calendar items should you consider such as annual meetings, membership drives, religious holidays, and other special events?

■ **Budget.** A campaign will require its own budget apart from the development budget. Start to think about what resources you might need to be successful, including technology, marketing materials, and professional counsel.

■ **Staff.** Is your team ready for a full-fledged fundraising campaign? Will you be able to successfully continue annual fund activities while taking on a campaign? Having the right people and enough of them in place will be essential for conducting a campaign.

Gather your team

You now have some big questions to answer. Should you embark on a campaign? Do you first need to enhance your organization's readiness for fundraising success? Immediately following the close of the study, gather your team of decision-makers—including the Ordinary, Development Director, CFO, or council leaders—to start this conversation. If you used professional counsel to conduct your study, make sure you and your team fully understand the recommendations and how they will be implemented. The decision-making process won't happen overnight, so it is best to start early and take advantage of the momentum you gained during the study.

The time period between a study and a campaign can range from a matter of weeks to over a year, depending on the study's outcome and your organization's readiness. The individuals you engaged in the study will expect something to happen, so make sure to communicate your plans and progress as appropriate. Regardless, view this time as the beginning of an exciting new chapter for your organization. Take the time to digest the information you learned in the study, thank those involved, and then begin creating a plan.



FOUR THINGS WE CAN LEARN FROM BLESSED ALBERIONE **ABOUT COMMUNICATION**

DON'T BE AFRAID OF TECHNOLOGY

"The power of the cinema surpasses that of the school, the pulpit, and the press, and can produce greater results." This quote from Blessed James Alberione is pretty bold. It tells us not to be afraid of the technology we have. We should rather embrace it and use it for the good.

BE A GOOD STEWARD

We are called to be good stewards of the things we have been given. Instead of looking at other parishes and wishing you had their resources, try seeing how far you can go with what you have been given.

IT'S NOT ALL ABOUT THE CHANNEL

While communication channels are important for getting the message across, we should be focusing more on the message we are trying to send, which is the good news of the Gospel. "The form will change, but the word of God will endure." -Blessed Alberione

PRAY!

Blessed Alberione was so successful because he was a man of faith. Here is a prayer he wrote about being a gift and allowing that gift to form our communications.

A Prayer to Say Yes Like Mary

O Mary, I place on my lips and in my heart a yes similar to yours: the yes of self-offering; the enthusiastic yes of love; the yes of total and generous self-gift; the serene yes of self-surrender to God's will; the trusting yes that is supported by the presence of God; a yes that smiles and is joyful; a yes to what is, what was, what will be; a yes that is offered every day in imitation of your response: Behold the Lord's servant, let your Word be enfleshed in me.



Finish Goals

Katie Herzing, Parish Coach

In January, almost all Americans undertake a collective effort to create a few resolutions. This will be the year I read more, watch less TV, workout every day, lose ten pounds, and reconnect with family and friends. As a parish you might be making some goals as well to meet budget, pray more, or do more outreach. Often times by the middle of February we've either intentionally abandoned our goals because they were too lofty and unachievable or we've forgotten about them completely. We want to change that for 2018!

Last Fall I read a book that transformed the way I set goals for myself and the churches I coach. It was by a business author I've followed for years, Jon Acuff. He wrote *Finish* after working with a researcher. They studied people trying to achieve a goal and worked through the things the most successful people did. I think these principles can be applied to churches as well, as I've outlined very quickly below. Read his book [*Finish: Give Yourself the Gift of Done*](#) for a more in-depth (and, often, humorous) look.

1. It doesn't have to be perfect.

When setting goals we shouldn't wait for all the perfect people to be in place, the perfect committee to be formed, or the perfect time to start. Now's the exact right time to start. Your first goal might be putting together a planning team of leaders to guide and direct your efforts. As we go, things will change and move, and that's okay! It's expected since our goal will become more defined once we start working on it.

2. Let's be realistic when we set our goals.

The main goal is to live the mission of the parish and thrive doing it. Assess where you are today by asking your parishioners where you're strong and what should be emphasized in the future. Then set a realistic goal based on that information. Remember, we are working toward change, not perfection. For instance: If your goal is to have 75% of active households commit to weekly prayer outside of Sunday Mass, cut your goal down to 40%. This is achievable, measureable, realistic and easier to celebrate. The momentum and celebration will help us work toward a greater goal in 2019!

3. Make it fun!

Jon found that this is one of the top three most important factors as to whether individuals complete their goals. In a church setting this might seem a little odd at first, but think about the communities you belong to and why you stay around. For me, it is because I have fun there, I laugh with those people, and I genuinely enjoy being with them. As you're working toward your goal to thrive and grow, be intentional about being a community that is genuine where people enjoy themselves and want to come back. Fun doesn't have to be a party with a piñata. Be creative when you think about joy and the mission of your parish to share the Gospel.

I can't wait to learn more about your parish's goals for 2018 and how you are finishing them! Now is the perfect time for your parish to become a Thriving Parish and share the Joy of the Gospel!



Keeping it Clean

Three Dirty Secrets to Clean Data

When we go into the office, we are busy tackling the issues of the day, responding to emails, organizing upcoming events, and preparing for the next campaign. Data hygiene is the last thing on our mind; it's boring, tedious, and annoying!

Inside the database, our records are moving around, periods are changing to commas, apartment numbers are disappearing, and we are left with inaccurate data which is *difficult to analyze*, and causes fewer correct mail addresses, leading to *lower response rates*.

1. Data Hygiene Plan

- Step One – Standardize the data to understand issues (names, addresses, postal standards)
- Step Two – Cleanse the data (find/replace, naming conventions, salutations, first name – last name)
- Step Three - De-dupe (identify duplicates, create hierarchy, merge duplicates, review relationships)
- Step Four – Enrich, Integrate, and Automate (add demographics, giving history, marketing touches)
- Step Five – Validate (review, test, QC)



2. Business Rules

Now that the data is clean, stable, and has gone through a rigorous QC process, it's time to set rules for users. In the Diocese and Parish environment, there are many ways data can come into the database environment. It is important to meet with the different stakeholders, understand the current processes, and evaluate the best way to standardize the input process. Consistency in input is critical to lowering the hygiene issues, so once you get the buy-in, set the rules and monitor. It is helpful to use dropdown boxes for common input fields such as city and state.

3. NCOA Changes and Updates

In order to receive non-profit mail status, mail lists are required to go through National Change of Address processing. This process produces important data and reports which are key to keeping your database up-to-date with moves, updates, changes, bad addresses, missing fields, and issues which cause a record to be managed on the clean-up side. This is a great resource to keep the data hygiene plan in place, and to monitor how the business rules are working to **keep the data clean!**