



**ISPD**

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**NAVIGATING IN CHALLENGING TIMES  
ISPD: Q&A DOCUMENT I**

APRIL 2020 - JUNE 2020  
FOR CATHOLIC SCHOOLS AND PARISHES

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**FROM CRISIS TO CHALLENGE TO CHANGE  
AN ISPD COVID-19 RESOURCE**

Dear Catholic Leader,

Over the past four weeks, ISPD (Institute for School and Parish Development) has been reaching out to Catholic schools and parishes throughout the country and inviting them to participate and/or take advantage of the following:


- ISPD's Virtual Catholic School and Parish Development Cohort Sessions every Monday at 1:00 PM Central Time where we share best practices – average weekly attendance is 200+ Catholic leaders from throughout the country. A post-webinar survey gathers further information after the session
- ISPD's COVID-19 Surveys to Catholic leaders every two weeks in which we seek answers to pertinent questions such as what challenges do you face, what are your needs, what questions do you need answers for, what are you doing about communication and connecting to your community, plus much more.
- ISPD's SPECIAL EDITION NEWSLETTERS which are published every two weeks and sent to over 20,000 Catholic leaders in every diocese in the country. Three editions have been published.
- ISPD's weekly Zoom sessions with invited Catholic school and parish leaders – 15 at a time – in which we invite folks to share their challenges and solutions.
- ISPD's weekly podcasts which talk about the challenges we all are facing in these difficult times.

Through these many conversations, surveys, and communication vehicles, we have listened carefully for the most frequently asked questions. With input from ISPD's staff; part-time associates (Joe Therber, president of Secena Memorial High School in Indianapolis; Tony Bonura, principal of St. Matthew the Apostle Elementary School in River Ridge, LA); and members of our National Advisory Board (Dan Ferris, superintendent of Catholic schools in the Diocese of Providence, RI; Marshall Hyzdu, president of Archbishop Moeller High School in Cincinnati, OH; Father Jim Manning, pastor of St. Mary of the Assumption Parish in Springboro, OH; Dr. Regina Haney, executive director of National Association of Church Personnel Administrators—NACPA), we would like to present ISPD's Q & A Booklet I which we hope will be an excellent resource for you to use during April, May and into June 2020.

Sincerely,



Frank Donaldson  
ISPD President



**Q1: What have you found to be the most effective ways to increase your enrollment?**

**A1:** Tell your story! If your school is doing distance learning, do it better than any other school in the area. Please get that message on Facebook, Instagram, and the school website. Flood your social media with pictures of your students loving learning at home with big smiles in front of the computer -- smiles reading books at home, smiling students doing exercise challenges in their backyard. Call your local newspaper. Now is the time to be an educational leader. Tell the world how your teachers are exceeding all expectations right now with distance learning. Get on local talk-radio -- that will attract families.

Take a partnership approach with parents. As a community of faith, we are building the Kingdom of God together; we are creating the school our community wants -- together. We know today's parents are more informed than they were a generation ago, certainly more than two generations ago; it would be foolish to not take advantage of their expertise and wisdom. Many are serving as leaders in their own profession; we need to use them as resources. Please believe they have great ideas.


**Q2: How do we ask for more money from those who have already given generously?**

**A2:** We've heard it so often: "These are unprecedented times." "These are extraordinary times." Yes, they are! We've seen unprecedented suffering and death in our state and right in our home communities. We've also seen extraordinary heroism and generosity. And, it is not over. We need to rebuild our church and school communities. That will take resources to reach out and restore the faith and bonds of unity we have lost. If you have been blest to be generous in the past, and the Lord has continued to bless you, the time is now to continue that generosity. Let any gift be a gift of gratitude to God for his generosity to you, and His mercy and protection for you and your family. And, if you don't really need that stimulus check, would you consider it a gift to help out the parish or provide a tuition grant to a child whose family has a parent out of work?

**Q3: How can we best ensure that our incoming 2020-21 class (elementary and secondary) is still attending our school?**

**A3:** Please consider the following:

- Conduct person-to-person outreach (with staff and/or volunteers) to every student/family whom you still consider to be a prospect for enrollment.
- Convey your eagerness to educate and serve them next year.
- Express your thankfulness for the enrollment steps they have taken and your eagerness to serve them through the remainder of the enrollment process. Ask what needs or questions they may have.
- Conduct a webinar meeting for prospective parents to thank them; inform them how the school is still educating, serving, and operating during the pandemic; and invite their questions, suggestions, comments, and/or concerns. Invite questions in advance of the webinar. Deliver prepared responses during the webinar. Record the webinar and distribute it to prospects and, possibly, current parents; or if you do not have this capability, send a summary of the webinar to prospects soon after the webinar.

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- Send a written message electronically or via direct mail from the pastor/principal/president to all prospects to thank them, inform them, and invite their questions, suggestions, comments, and/or concerns.
  - Include as often as possible the question of what the school can do for the prospective family.

For high schools, a virtual incoming freshman Zoom assembly is probably the best for energizing the students. Another winning strategy is short welcoming videos with 30-second greetings from the pastor, principal, president, a couple of teachers, athletic director, arts director, and others that will remind applicants the school is waiting to receive them in the fall. If these can be personalized with the name of the student at the beginning, all the better. Also, consider sending home “rah rah” school gear. Has anyone created the bandana with a school logo on it that will double as a facemask?

For parents of incoming students, a call from the admissions team, or an administrator, to every student’s parents every 2-4 weeks should remind them that the school is expecting to see their sons and daughters as usual. This is also a chance to find out if there are financial concerns that may interfere with student enrollment. If so, financial assistance or deferment of tuition can be discussed.

All of this can help make them feel a part of a community that they could not imagine leaving.

**Q4: How can we continue to collect and ask for money to keep our doors open while still serving the community and honoring the significant changes in financial status for many?**

**A4:** This is a time when schools need to invite conversations about financial need. Lost income and financial hardship are often embarrassing for families that have always been able to pay their tuition in the past. Schools need to reach out to their families. “We know this is a tough time for many of you. We’re here to help. Give us a call or email. We want to work with you.” This is proactive and better than simply losing families. It’s true the school may not be able to meet all the parents’ financial need, but a combination of tuition payment deferments and looking for new sources of financial aid might do the trick. This is also the time that schools should have an online giving rally for tuition assistance. “We’re all in this together. Together, let us help our families in need.”

**Q5: How can we create an online/virtual tour for our Catholic school and/or parish?**

**A5:** One of the resources that we have been able to research was recommended to ISPD by a Catholic school in the Diocese of Providence. Jonathan Powell and his company work with Catholic schools and parishes in helping them create virtual tours and virtual Open House experiences. He has a strong Catholic background and is willing to travel during these times and work with you. Pending on your situation and needs, his price range is between \$2,500 -- \$5,500. If you mention that you were referred by Frank Donaldson and ISPD, you will receive a 10% discount. Here is his contact information:

- 845-600-5526 and [jpowell@openhouseschoolmedia.com](mailto:jpowell@openhouseschoolmedia.com).
- Jonathan’s Website: <https://openhouseschoolmedia.com/>
- Sample client: [Monsignor Clarke Catholic School](#)

In addition, try Google’s Tour Creator <https://arvr.google.com/tourcreator/>. There are also YouTube videos that explain how to use this Google augmented reality tool.



**Q6: What are the best ways to show the school cares?**

**A6:** Simple answer: communication. You can empathize with your students, parents, faculty and staff through multiple communication avenues.

- **Action Plans:** In uncertain times, people crave certainty; the best leaders are those that can create certainty by clearly communicating expectations (i.e., teachers' availability, timing for assignments/grades).
- **Personal Outreach:** In a virtual world, people are craving connection.
  - **Principal:** Zoom meeting with all graduating students
  - **President:** Personally, calling every senior parent (high school)
  - **Coaches:** Calling every parent; regular zoom conversations with the team
  - **Assistant Principals:** Calling all parents/students struggling academically in this new environment
  - **Freshmen/Sophomores/Juniors:** Writing letters to Seniors to affirm them and thank them for their leadership
  - **Leadership Team:** Virtual happy hours of appreciation
  - **Finance:** Personal meetings with people struggling with the financial downturn; building a plan to make it work for the family
  - **Advancement:** Calls to every one of your financial leaders to thank them

Send short surveys—one or two questions -- asking the parents how everything is going. Let them respond with comments, stars or even emojis (thumbs up, thumbs down).

**Q7: What are the greatest factors influencing retention?**

**A7:** Personal outreach, empathy, and working with families struggling financially. Other suggestions to consider:

- The greatest factor influencing retention is being proactive in identifying those families that have said they are leaving or are saying they might leave.
- Schedule in-person meetings with those families and take the time to understand their reasons for leaving.
- After identifying the reasons, give them a vision of how the school will be addressing their concerns
- Present them with evidence that their child is thriving or how they might thrive with new initiatives that are coming they may not be aware of, and why a move might not be in their best interest.
- Sometimes families are not aware of the hard work that is going on and they leave the conversation with a different perspective.
- If it is finances, find a way to make it work; often the family only needs a little help and more likely they just need a conversation to bring peace of mind.
- Often financial difficulties are temporary; take the long view. Is it really wise to lose a family that may be with you for several years over a temporary financial setback?

It is much easier to keep the families you have than attract new families. Retaining what you have is often overlooked and can have significant financial implications in either direction.

**Q8: How do we engage staff that do not see communication as their issue or that marketing is “wrong” in a pandemic?**

**A8:** If you have begun an internal awareness campaign to raise staff members’ awareness and understanding that communication and marketing are everyone’s job, then continue to build on that foundation. Ensure that they understand the relationship between their day-to-day efforts and the sustainability of the school. Provide concrete examples of how staff members’ actions positively impact enrollment and supporters’ confidence and support. Include staff members on all external communications in which you are demonstrating to the community how the school continues to educate, serve, and operate during the pandemic.


If such an internal awareness campaign has not begun, now may be a good time to gather a group of constructive, mature, big-picture thinkers among the staff to ask their advice and involvement relative to getting more people to see that the quality and quantity of their work is directly tied to enrollment and financial results. In either case, have the confidence and the message to articulate that marketing for students, staff members, dollars, and image is essential. Such marketing provides the fuel for the car of the school to run. Without the fuel, the car simply sits still and does not drive anyone anywhere.

**Q9: How should we move forward if the COVID-19 days extend even longer throughout the year or future when this becomes the new norm?**

**A9:** From the Diocese of Providence, RI: We need to plan as if this crisis could last until late summer or early fall -- or reoccur. High quality distance learning is the only real solution. Catholic schools must quickly become experts, and many have. We can do this and do it exceptionally well. In the Diocese of Providence, we have asked our schools to take the following pledge and post it on their website. It speaks to our confidence in what we are doing and our commitment to our parents and families.

**AS WE PROGRESS WITH DISTANCE LEARNING, WE MAKE THIS TEN-POINT PLEDGE TO OUR FAMILIES AND STUDENTS:**

1. To provide every student at every grade level a continuous content-rich curriculum
2. To offer instruction using the most effective and engaging synchronous and asynchronous platforms and practices
3. To balance high-quality on-screen learning with unplugged learning activities that involve personal interactions at home with family
4. To personalize learning to the interests and aspirations of our student-scholars and differentiate content and delivery for their innate abilities and potentials
5. To meet effectively the special learning needs of students with exceptionalities
6. To provide meaningful and multiform assessments that guide teacher instruction and assist students and parents with understanding the students’ mastery of content and skills
7. To compassionately support the social and emotional needs of our students in this time of uncertainty and widespread anxiety
8. To ensure that students are safe when online and their privacy secure

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9. To communicate regularly and meaningfully with parents, our partners in education
  10. To ensure a fully Catholic education under the inspiration of Christ the Teacher who informs our teaching and guides our students' learning.

*While our school may be closed temporarily, the hearts and minds of our students remain open—open wide to faith and learning. And although we are distant from each other for the health and safety of our classmates and families, we are united as one community in the Body of Christ. This is a sacred bond that is stronger than anything that can separate us.*

**Q10: In times of need, what best practices do you recommend for development/advancement?**

**A10:** Thank donors for their prior support. If possible, provide an example(s) of how their prior support (for example, for technology or undesignated support that has allowed the school to invest in technology) has allowed the school to continue operating successfully during the pandemic. When a donor knows that his/her prior generosity is paying dividends today, he/she feels good about it and is likely to continue when able.

Convey in all communications to donors (e-mail special messages, pledge reminders, personal phone calls, direct mail outreaches) that you are remembering them in your prayers.

Inform donors, in writing and verbally, of the tangible and measurable ways that the school is continuing to educate, operate, and serve during the pandemic.

Invite donors' questions, comments, suggestions, and/or concerns; and ask what the school can do for them. Involve donors in planning sessions via Zoom or other means. Now is the time to build this community of stewards for your Catholic school and parish.

**Q11: How do we best evaluate timelines for giving campaigns during challenging times (such as now)? We are seeing some schools do "giving asks" and yet, we feel that the timing is not "right" for that at the moment. Thoughts?**

**A11:** All things being equal, value relationships and circumstances in community members' lives more so than reaching a financial goal or completing a project on time. Engage key donors and/or volunteer leaders in dialogue about appropriate timing.

All things being equal, have the confidence and patience to pause a campaign. Realize that pausing is not the same as stopping. While pausing from asking, a school can still thank, inform its community, and invite questions, comments, suggestions, concerns, and ways in which the school can help individuals and/or the community. In times like these, especially when we do not know what future schedules will be, it is best to use words like "pausing," and "re-scheduling." We do not want to give false hope, but we also do not want to "squash" all hope.



**Q12: We just started re-enrollment in February before COVID-19 started. We have half our families that have enrolled for next year. How do we “gently” ask them to enroll for the next school year when many do not know their job situation?**

**A12:** Although this type of question is asked above, here are more suggestions:

- Continue the re-enrollment process as a standard operating phase of the school.
- Include messaging that thanks current families for being integral members of the community and convey your eagerness to serve them during the coming year.
- Continually communicate examples of how the school is educating, operating, and serving
- Depending on your situation, if you want to gain visibility to the extent to which families are considering not returning, you may want to include a questionnaire in which you ask families to select the option that best pertains to them: (a) We plan to return for the 20-21 year; (b) We would like to have a conversation about our intent to return for the 20-21 year; (c) We do not plan to return for the 20-21 year. For every family who selects (b) or (c), commit to assigning at least one person to contact them to express interest and to listen and learn what concern(s) they may have, which can then be converted into a going-forward plan to retain them unless doing so would not be appropriate.
- Implement re-enrollment incentives for families who re-enroll by May 1: Perhaps a discount on tuition or the enrollment fee.
- Recognize the families that re-register on time – a thank-you note from the principal or teacher to thank families for re-enrolling. Maybe the Home and School ambassadors can write personal thank-you notes.

**Q13: What would be carefully worded communication to donors or families on collecting current obligations – for annual funds and/or capital campaigns?**

**A13:** Be completely open to restructuring the length of donors’ pledges and/or the pledge fulfillment schedule. Consider sample pledge reminder language:

*I hope and pray that you and yours are healthy and happy during these challenging times. I also want to take this opportunity to thank you very much for your generous pledge to the (CAMPAIGN/DRIVE NAME for SCHOOL). Your generosity, especially during these times, helps us (to do what?) Thank you so much for helping our school move forward.*

*Below, we have provided a summary of your generous pledge account according to our records. If we need to adjust our records or if you have any questions, please contact (NAME of PERSON) at (PHONE NUMBER or E-MAIL). If you can, send your next pledge payment in the enclosed envelope by (DATE); we would be most grateful.*

*Thank you once again and please know of our prayers for you and yours.*



**Q14: What does ISPD believe to be one of the most important things that Catholic schools and parishes should be doing at this time.**

**A14:** Simple two answers are: Proclaiming the value of our Catholic faith and communicating to all. Because we believe schools and parishes are doing the above in many ways, right now we strongly believe in three words: BUILD YOUR COMMUNITY! Reach out beyond the “second ripple” and engage people.

**Here are some suggestions for Catholic schools.**

- Personal phone calls to parents (by principal, faculty/staff, advancement personnel, advisory council members, etc.)
  - » How are you doing?
  - » Do you need anything?
  - » Let me share some positive updates.
  - » Any questions about anything?
  - » We are here for you! Together, we will get through these times.
- Zoom (or whatever you are comfortable with) meetings with parents by class (one or more classes at a time) by the principal
  - » For agenda items, please see above
- Student leaders host “SOME GOOD NEWS” sessions via video, Zoom, etc.
  - » 2-3 student leaders share “SOME GOOD NEWS” every week – closing with an invitation for people to e-mail the school if they would like to serve on an ad hoc team that will reach out to others in the school community to see how they are doing.
- Personal phone calls to financial leaders (by president and/or principal, advancement director)
  - » All of the above agenda items + THANK YOU for all you are doing and continue to do.
- Brainstorming/Planning Sessions via Zoom Meetings with parents, alumni, parishioners, parents of alumni, benefactors, boards, and councils, etc.
  - » Positive updates on the school
  - » Challenges the school is facing at this time
  - » Open discussion on possible solutions
  - » Thank you
- Senior/Alumni Connection (members of the Class of 2020): Seniors reach out to alumni throughout the country via phone to check and see how those alums are doing. Talking points:
  - » Introduction
  - » How are you doing?
  - » Positive things going on at school
  - » Let us know if you need anything.
- Zoom meetings with alumni classes (hosted by class reps and school official like principal, president, alum director, advancement director, etc.)
  - » Introductions with each class member sharing how they are doing
  - » Positive things going on at the school

- » Challenges the school faces
- » Suggestions from the class members on the call on how to solve those 2-3 challenges
- » Let us know if you need anything.
- Virtual Coffees with Principal
  - » Same agenda as Zoom meetings with parents
- Calling Tree to Current Parents (by parent leaders)
  - » Same agenda as parent phone calls
- Virtual Admission Appointments (by principal, admissions director, advancement director)
  - » Have form on school website where parents interested can connect with someone for information via a virtual tour and Zoom meeting.
- State of the School Webinar Message to All – Bi-Weekly (by president and/or principal) – via GoToWebinar or Zoom Webinar or any other vehicle where two-way communication can be accomplished
  - » Opening Prayer
  - » Positive School Updates
  - » Challenges School Faces
  - » Ways to Get Involved
  - » Please Let Us Know How We Can Be of Assistance to you.
- Formation of a National/Regional Advisory Board of 8-12 Alumni Who Live Out of Town or Past Parents (by president and/or principal) – meet monthly via Zoom
  - » Opening Prayer
  - » Introductions/Thank You
  - » Positive updates on the school
  - » Challenges the school is facing at this time
  - » Open discussion on possible solutions

**Here are some suggestions for parishes:**

- Personal phone calls to elderly parishioners (by pastor, staff, parish council members)
  - » How are you doing?
  - » Do you need anything?
  - » Let me share some positive updates
  - » Any questions about anything?
  - » We are here for you!
- Zoom (or whatever you are comfortable with) meetings with ministry leaders and members of their ministry by the pastor, deacons, parish staff, etc.
  - » For agenda items, please see above
- Personal phone calls to financial leaders (by pastor, development director, deacons, etc.)
  - » All of the above agenda items + THANK YOU for all you are doing and continue to do.
- Parish leaders host “SOME GOOD NEWS” sessions via video, Zoom, etc.
  - » 3-5 parish leaders share “SOME GOOD NEWS” every week – closing with an invitation for people to e-mail the parish if they would like to serve on an ad hoc team that will reach out to others in the parish community to see how they are doing.

- Brainstorming/Planning Sessions via Zoom Meetings with parish leadership groups and selected parishioners)
  - » Positive updates on the parish
  - » Challenges the parish is facing at this time
  - » Open discussion on possible solutions
  - » Thank you
- Virtual Coffees with Pastor – open to new parish families within the past year
  - » Same agenda as personal phone call meetings
- Calling Tree to Current Parishioners (by parish leaders)
  - » Same agenda as parishioner phone calls
- Virtual New Parishioner Registration (by pastor, deacons, parish staff, etc.)
  - » Have form on parish website where prospective parishioners can connect with someone for information via a virtual tour of the church and Zoom meeting.
- State of the Parish Webinar Message to All – Bi-Weekly (by (pastor) – via GoToWebinar or Zoom Webinar or any other vehicle where two-way communication can be accomplished
  - » Opening Prayer
  - » Positive Parish Updates
  - » Challenges Parish Faces
  - » Ways to Get Involved
  - » Please Let Us Know How We Can Be of Assistance.
- Evening Prayer Service via Zoom (by pastor, associate, or deacon)

For years, we have been talking about expanding the ripples (pebble in the pond theory); this is why you need your Core Team, your 120-Day Operational Vitality Team, or whatever you want to call it. As a school and/or parish leader (president, principal, pastor, advancement director, etc.), you cannot do this alone. Please understand the value of people engagement. Now – in these challenging days -- is the time to move forward and build your community. ***Belonging leads to believing.*** Right now, more so than ever before, people want to belong. Please invite them. I believe you will be quite surprised at the number of people who will serve.

**Q15: As a Catholic leader, I have been trying to stay organized and put all that we are going through into some kind of perspective so I can better understand and communicate. From ISPD’s point of view, what is your “take” on what is happening with Catholic schools and parishes?**

**A15:** During this unbelievable time of change right now for all Catholic schools and churches, we believe it would do us all well to revisit and fully understand the stages of change process – in ISPD language. Possibly, this can bring some clarity and perspective.

Here is the change we have seen, the change we are seeing, and the change we all need to embrace.

### **Stage 1: Norm**

- Several months ago, Catholic schools and parishes in the United States operated and lived their own norm – the way they operated hour to hour, day to day, and week to week. The 2019-20 school/fiscal year moved right along, and we continued to serve millions of people.
- Anything out of the norm -- we had possibly experienced before.

### **Stage 2: Inform**

- As we moved into 2020, we began to hear more of some kind of virus. From Business Insider here is the early timeline:
  - » On December 31, 2019: Chinese Health officials informed the World Health Organization about a cluster of 41 patients with a mysterious pneumonia.
  - » January 7, 2020: Chinese authorities identified a new type of coronavirus (called novel coronavirus or nCoV).
  - » January 11, 2020: China recorded its first death.
  - » January 20, 2020: First U.S. case was reported.
  - » January 30, 2020: WHO declared a global public-health emergency.
  - » Day to day and hour to hour, we all listened and watched and wondered.

### **Stage 3: Alarm**

- In February, the alarms began to go off with many Catholic leaders, and by mid-March many Catholic schools and churches were closing. By March 19th, nearly all U.S. states had declared a state of emergency. We moved to Stage 4.

### **Stage 4: Storm**

- As we moved to the end of March 2020, many Catholic schools and churches were in the middle of the storm. As ISPD has heard from hundreds of Catholic leaders (via surveys, clients, on-line students, Monday cohort sessions, etc.) some have begun to move to Stage 5; some are in Stage 5; and, some are wondering how to move out of Stage 4. We do know this: It is important not to stay in the storm for too long. We all need to move into Stage 5. In other words: All Catholic schools and churches need a Plan of Action NOW!

### **Stage 5: Re-form**

- Many Catholic schools have re-formed with on-line education and electronic and virtual communication. Many parishes have re-formed with live streaming of their masses, along with other forms of communication. The one area that we see that has not been developed is an Operational Vitality Plan for the next 120+ days. This will get us fully out of the storm, safely into our re-formation, and help us establish our new norm – which is ever-changing, and yet will need our creativity and innovation. ISPD believes we cannot move there unless we engage people. We keep saying this. *Belonging leads to believing.* We cannot do it “eyeball to eyeball,” but we can do it. No longer do one or two people have the answers. Every Catholic school and parish need collective wisdom.



## Stage 6: New Norm


- What will be your new norm? Although many of our old norms are no longer available, we must create the new ones. Now is the time to get that in place. It may be short-term for the next 3-6 months, but we all need a written plan of action – especially in area of Operational Vitality:
  - » Communication
  - » Enrollment Management
  - » People Engagement
  - » Leadership
  - » Fund Development (Annual, Capital, Memorial, and Planned Giving + Grant Writing and Major Gifts)
  - » Alumni Involvement
  - » Special Events (many virtual)
  - » Total Stewardship
  - » Constituent Records

We all will get through this; we are not alone; our Catholic leadership community in this country is strong – locally, regionally, and nationally. Here at ISPD, we will lead by doing what we believe we do best: offering services and processes that will engage people. We will come out of this crisis with new norms, with unique changes, and with greater appreciation of our own Catholic identity and ministry.

### **Q16: Once the pandemic is over, how/what will we communicate to bring people back to church?**

**A16:** We believe, like many others, that when “this is over,” we are not going to simply flip a switch and everything in our parishes and schools will go back to normal. We believe that there will be a period of transition that may last for 3-6-9-12 months, pending on the area of the country and pending on what government and church officials declare as safe. That being said, we also believe that NOW is the time to start your planning for “re-entry” or “re-engagement” or “re-structuring.” Please look at what we said in Question # 14. There are ways you can build your community NOW by inviting your parishioners to help plan the recovery. We need to make sure they are a part of our parish “renaissance”. Granted, you cannot predict exactly how or when or what, but you can begin to talk about different scenarios. You can begin to create challenges for people to help you solve and then connect with them and gather their best wisdom. Realizing the timeline is unknown, perhaps some of those challenges could be:

- When we are given permission to phase our parish back into normal operations with people being present, what do you believe we should do first?
- What sacraments do you believe we should try and make available first in the initial recovery period?
- What ministries should we make sure are “up and running” first in the initial recovery period?
- How do we convince people who have gotten used to “attending Mass” via their technology that their physical presence is needed in order to build our community back up?
- What ways and means of communication should we emphasize the most in our initial recovery period?

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- In our initial recovery period, what messages do you believe should be the most important that we deliver?
  - Realizing that many people have been negatively impacted financially, should we invite our parishioners to financially support the parish at this time?
  - What do you believe is the most important thing we need to do as a parish when we implement our recovery process?

**Q17: Is it wise to begin a capital campaign during a slower or down economy?**

**A17:** Now is not the time to begin the typical capital campaign for Catholic schools and parishes. Normally, this type of campaign is preceded by the Financial Feasibility Study, and this would be difficult to accurately predict what donors would do in light of the present job market and the ebb and flow of the stock market -- which impacts individual portfolios. However, this would be a good time to create the Site Master Plan (for facilities) and/or to create the case/position statement for your campaign. This would certainly turn attention to the future, and more than likely would give a breath of fresh air to many school/parish leaders. This would also be a good time to take a close look at the case points for a capital campaign that would be something other than renovation or restoration or refurbishment or building something new. Perhaps now is the time to discuss what endowments you want to fuel or create – for tuition assistance, technology, faculty professional growth, maintenance, etc.

That being said, the typical capital campaign -- with the typical donor -- may be on hold for a while. It may be that Catholic schools and parishes may need to consider COVID-19 campaigns that will focus on tuition assistance, family needs, community outreach, salaries for staff, and food for their community. That will be a totally different type of campaign, and donor selection would be quite different. ISPD will be discussing this in future communications.

**Q18: Are there strategies on how to prepare for the NEXT school year?**

**A18:** For the past two weeks, ISPD has been pleased to sponsor Dr. Tim Uhl, superintendent of Montana Catholic schools and author and podcaster of Catholic School Matters. Tim's publications and podcasts provide outstanding information on the challenges we are facing. In his recent newsletter, released on April 13, 2020, he offers "A Road Map for Six Weeks." In this article, he discusses six areas of consideration:

- Financial/Advancement
- Graduation/Rituals
- Recruiting and Marketing
- Cash Flow and Budget
- Human Resources
- Summer Programs

In addition to the information that Dr. Uhl provides on the above areas, there are many other resources that are referenced. Please google Catholic School Matters or click on the link -- <https://www.smores.com/tpacx>

**Q19: What are some creative ideas for third source funding? I was thinking of ideas beyond annual giving and campaigns.**

**A19:** Indeed, now is the time to get creative. While it is important to consider ways of implementing annual funds, capital campaigns, and fund-raising events (albeit virtual) in the future, there are other avenues to explore. Here are some suggestions:

- Grant writing: Contact The Grantsmanship Center for excellent information.
- Research as many resources as you can on Planned Giving. Now is the time to form that Planning Giving Council to help you set this up and promote it.
- Explore ways that you can make Memorial Giving available in your parish and/or Catholic school.
- Discuss ways with your school/parish leaders on how to create walkways and pathways and walls where you could sell bricks/pavers that would go to funding something that is needed at this time.
- Explore federal, state, and local funding opportunities for non-profit institutions.
- Create a Gift Catalog of needed items for your school and/or parish (with pictures) and distribute it.

**Q20: What does a successful Operational Vitality (Core) Team look like?**


**Q20:** Your Operational Vitality Team (Core Team) should have two components: 1. An Executive Committee made up of 3-5 people such as the pastor, principal, president, board/council chair, development/advancement director, finance chair, etc. This Executive Committee guides the process and makes final decisions and also recommends additional OVTeam members. 2. The OVTeam should be well-represented with parents, parishioners, alumni, faculty, staff, donors, past parents, etc. The entire team should be approximately 12-15 people. Their goal: Educate, facilitate, implement.

**Q21: How can we broaden our base of support?**

**A21:** Now is the time to move on this. Please refer to Q/A # 14 in this document. The theme we have been promoting and will continue to promote will be: BUILD YOUR COMMUNITY -- NOW! When you look at the many suggestions in Q/A # 14, and possibly decide on 2-3 of them, then you will automatically begin to broaden your base of support. Right now, that “base of support,” does not necessarily mean people who will financially support; it means inviting and engaging people who will help you re-cover and help you prevail and not just survive. Some of that could be financial support, but that should not be the primary objective. All Catholic schools and parishes will need resources – people, finances, wisdom, talent, ideas, creativity, etc. And, the more you are able to reach out and involve, the more your “collective wisdom” will grow. Now is the time to move beyond your first two ripples.

**Q22: How to build a parish-school relationship during shelter-in-place?**

**A22:** In a parish-school structure, one of the main challenges has always been communication. In ISPD’s 30 years in business, we have seen many wonderful examples of schools and parishes that have worked well together, and we have seen other situations where there was tension. If there was ever a time in our history where these two entities (although the school is a ministry of the parish) need each other, it is now. Presently, parishioners are worshipping at home, and students and faculty are involved in distance learning. The day is coming when it will be time to begin the road to recovery. How will that happen – for both the school and the parish? Several schools and parishes we are working with are following the five-step process we recommend:

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1. Pastor and principal begin the conversation of recovery with each other.
  2. Pastor and principal begin the conversation of recovery with the Parish Council and Finance Council.
  3. Pastor and principal begin the conversation of recovery with the School Advisory Council/Board.
  4. Pastor and principal convene a collaborative meeting of Parish Council, Finance Council, and School Advisory Council/Board to discuss the main areas/challenges that need to be addressed in regard to recovery.
  5. Using all of the above entities, 3-5 smaller groups (with equal representation) create the strategic solutions to solve the above challenges.

Bringing the parish and school together in these times will be critical for future success.

**Q23: What does “pausing” look like in regard to raising money?**

**A23:** Although this has been referred to in other questions in this document, it is worth repeating. “Pausing” means that your school and/or parish has made the conscious decision not to actively solicit financial contributions at this time from your broad base of support. However, pausing does not mean that you have paused the process of building relationships. That should be full steam ahead.

One of the questions we have heard about this pausing stage of inviting financial support is: How long? That will greatly depend on your own situation. Some schools and parishes will be ready to actively invite people to contribute within the next 30 days, and others will need to wait longer. As you read through the answers in this Q & A document, I believe you will see a major theme: “Pipeline to your people!” Through two-way conversations (Zoom meetings, phone conversations, etc.) ask your parishioners, your parents, your alumni, and your financial leaders. They always have the best answers. We just need to listen. There is no magic formula, and there is no one size fits all.

**Q24: What are best practices for shifting from fundraising to development?**

**A24:** Everything we have been talking about in this Q & A document deals with Catholic School and Parish Development: the meaningful involvement of people in your mission and vision for the future. Right now, more than ever before for many Catholic schools and parishes, you have automatically switched into development. You are meaningfully involving people; you are reaching out and building relationships; you are making your communication a two-way street. The processes that we refer to in this document are your best practices.

**Q25: In the Monday, April 13th ISPD Virtual Cohort Session, one of the presenters referred to a survey that his elementary school used with their parents. Is there any way we could see a sample of that survey?**

**A25:** Tony Bonura, principal of St. Matthew the Apostle School in River Ridge, LA, and also one of the contributors to this Q & A document has agreed to share their school’s parish survey. The link to that survey can be found by [clicking here](#).





# Institute for School & Parish Development

