

*Growing pains,
bumps in the road
and not expecting miracles:
The early days of establishing a development office
Or....
What I know now that I wish I'd known four years ago*

Who's here today?

- ▶ Development Professional?
 - Development Directors?
 - Development/Alumni Relations Officers/managers?
 - Administrators?
- ▶ Headteachers/SMT members?
- ▶ Governors?

Health warnings / Caveats

- ▶ This presentation is *not*.....
 - A time line of what to do
 - Something to follow slavishly
- ▶ Feel free to disagree.....
- ▶ Go your own way.....
- ▶ Come up with your own recipe
- ▶ Do what's right for your school's circumstances

Bishop's Stortford College Development Office

- ▶ Alumni Society Administrator – part time
 - Looks after alumni committee, coordinates copy for biannual alumni newsletter
 - 25 years in post
- ▶ Alumni Relations Officer – full time
 - Manages all reunion/networking events
 - 6 years in post
- ▶ Development Director – full time
 - Oversight of alumni relations
 - Responsible for fundraising
 - 4 years in post
- ▶ Office Administrator – full time
 - Manages the database
 - Admin support
 - 3 years in post

“Who’s that?” Get known in your school

- ▶ Can be difficult.... Spouse not work there? Children not there? Don’t live on site? Not an alum yourself? So.....
- ▶ Volunteer – do something that is not the job – What are your hobbies?
 - Drama
 - Music
 - Sport
 - Photography
 - Degree qualification
- ▶ Or.....
- ▶ “Easy” way to get known..... land a huge gift.....

Things to do early on

- ▶ SMT & Governors – *you're* the expert, educate and manage expectations. Tell them.....
 - Need a decent budget – in order of: database, staffing
 - “Good things take time”..... don't expect fundraising miracles
- ▶ Write Fundraising Strategy – present draft on day one. Sources – Headmaster's Site/Curriculum plan, Bursar's Plan, Annual Accounts..... Then revise..... conversations from alumni, parents, SMT
- ▶ Fundraising and Alumni Relations Training – send SMT, Governors and Development Team. Use IDPE!!!!!!!
- ▶ Not rocket science – pinch ideas – plagiarism is good
- ▶ Make your own gift.... according to your means!

Comms

- ▶ Do you control the alumni magazine....?
- ▶ You need to! Especially if you're paying for it.....
- ▶ Make Headmaster/Bursar/Chair of Development Committee understand

Growing pains – Expect resistance

- ▶ Alumni Committee members
 - Friendly....
 - Feel threatened.....
 - Don't like fundraising.....
- ▶ So..... find an ally.... put on Development Committee
 - Someone who can say your words for you to alumni committee

This can be a lonely business

- ▶ Find a confidant
 - Colleagues in similar department in another school
- ▶ Visit (don't just phone/email)
- ▶ Remember – other offices aren't better – just have different problems
- ▶ Attend regional IDPE meetings, junior staff too
- ▶ One nugget of info makes a day's road trip worthwhile

Finding missing data

- ▶ Cover sheet for alumni magazine posting – do immediately!
 - part mini survey/part donation form – don't leave one side blank
 - Very cheap info gathering and fundraising method (include post paid envelope!)
- ▶ Make sure all names and DOB on database first. Then.....
- ▶ Find lost alumni – Use LexisNexis (GDPR health warning.....)
 - BSC – 2000 names with DOB sent
 - 120 dead
 - 800 found – “Hello we’ve found you” letter, survey and alumni mag posting, 20% response rate to the survey. 3 said get lost....
 - Two legacies promised already
 - Cost c. £700 to search c 2000 records
- ▶ *Then* carry out a full alumni survey –online where possible, hard copy/freepost envelope where not
- ▶ *Then* use manual methods, LinkedIn searches etc....
- ▶ Reunions – promote as Facebook events – great way to help find losts

Start Fundraising early on

- ▶ Channels
 - Direct mails
 - Telephone campaigns
 - Emails
 - Alumni mag cover sheets
 - Advice visits – potential major donors
- ▶ Potential major donors – include don't "park on shelf for rainy day" – wake them up – fundraising is happening now!
- ▶ Legacies – Don't need mass leaflet posting – instead....
 - Tick box on surveys/info update forms "Tick this box if you would like to receive more information about legacies"
 - Send a legacy pack
 - Go and meet them
 - Invite to lunch hosted by Head – [Insert founding year of your school] Society
 - Also try legacy focus groups – not asking legacies, just asking for views

Fundraising Projects – Beware what you take on

▶ The three bears analysis

- Too Cold – Projects the school is going to carry out anyway and underwrite. Why should anyone make a gift? Can make the case but weaker than.....
- Just right – Projects that the school would ideally like carry out (not in the cash flow) but can only do if a major gift makes it possible (Need to find the donor first)
- Too Hot (To Handle) – Projects that the school is determined to carry out, as no money of its own to put in, expects you to raise it all but your constituents don't have the affinity and/or interest and/or capacity to give.

You will upset people

- ▶ Accept it
- ▶ Acknowledge comms preferences e.g. remove from fundraising
- ▶ Find ways to keep them interested:
 - Alumni magazine only (no asks)
 - Sport – alumni v school fixtures
 - Music – reunion band – reunion Carol Service choir
 - Classic Cars etc

Be careful allocating your time – Stakeholder Analysis

High Giving Potential	Keep Satisfied – invite to bespoke events, request “advice visits” – mostly ignored	Manage Closely – they actually attend bespoke events, accept “advice visits” Make major gifts
Low Giving Potential	Monitor – Minimum Effort Required (Send alumni magazine, bulk emails etc, invite to mass alumni events). They don’t read the magazine, don’t attend events, give little money	Keep informed Send alumni magazine, bulk emails etc, invite to mass alumni events) Small group who come to everything – frequently in contact with the Development Office. Give some money
	Low affinity with school	High affinity with school

Further reading

- ▶ IDPE Guide to Starting School's Development by David Young
- ▶ Fundraising Management by Adrian Sargeant & Elaine Jay – Chapters 2 and 4
- ▶ Prospecting for Benefactors by Mathew Iredale (beware of GDPR issues.....)

And finally.....

- ▶ “It’s all very well having a good Development Director, you just need a lucky Development Director”
- ▶ “The harder I try, the luckier I get”

Questions.....?

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