



# Juggling the external relations balls

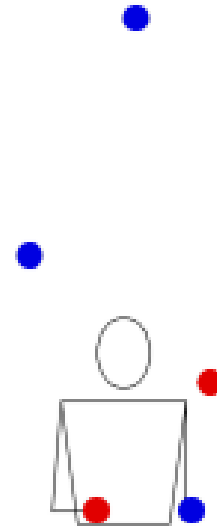
**Karen Hartshorn**

Director of Development  
Pangbourne College

Chair: Joel Trotman

# Juggling the External Relations Balls

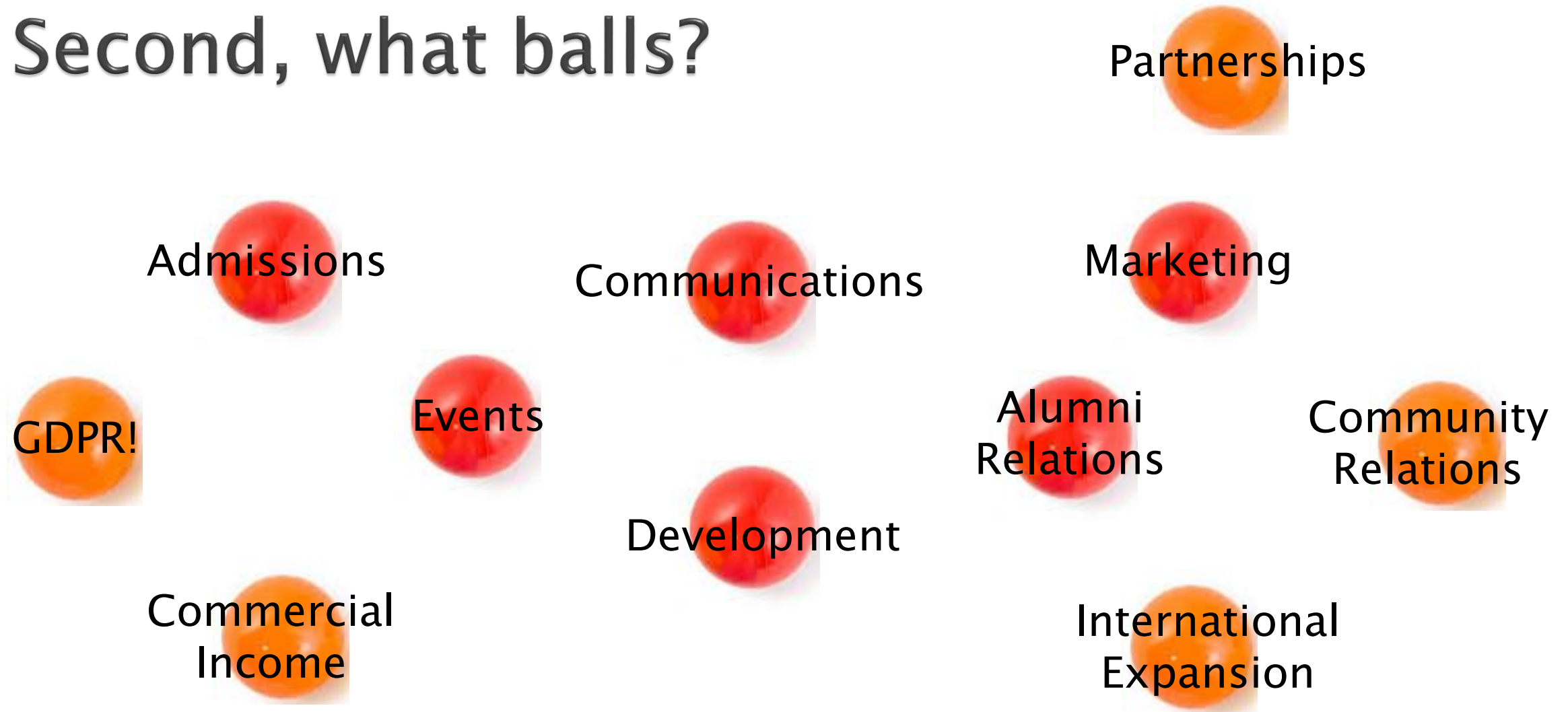
- ▶ Karen Hartshorn
- ▶ Director of Development
- ▶ Pangbourne College



# First, some credits

- ▶ This presentation has benefited enormously from the wisdom of....
- ▶ Cari Depla, Director of Development, St. Mary's Calne
- ▶ Hannah Hamilton, Director of External Relations, St. Peter's York

# Second, what balls?



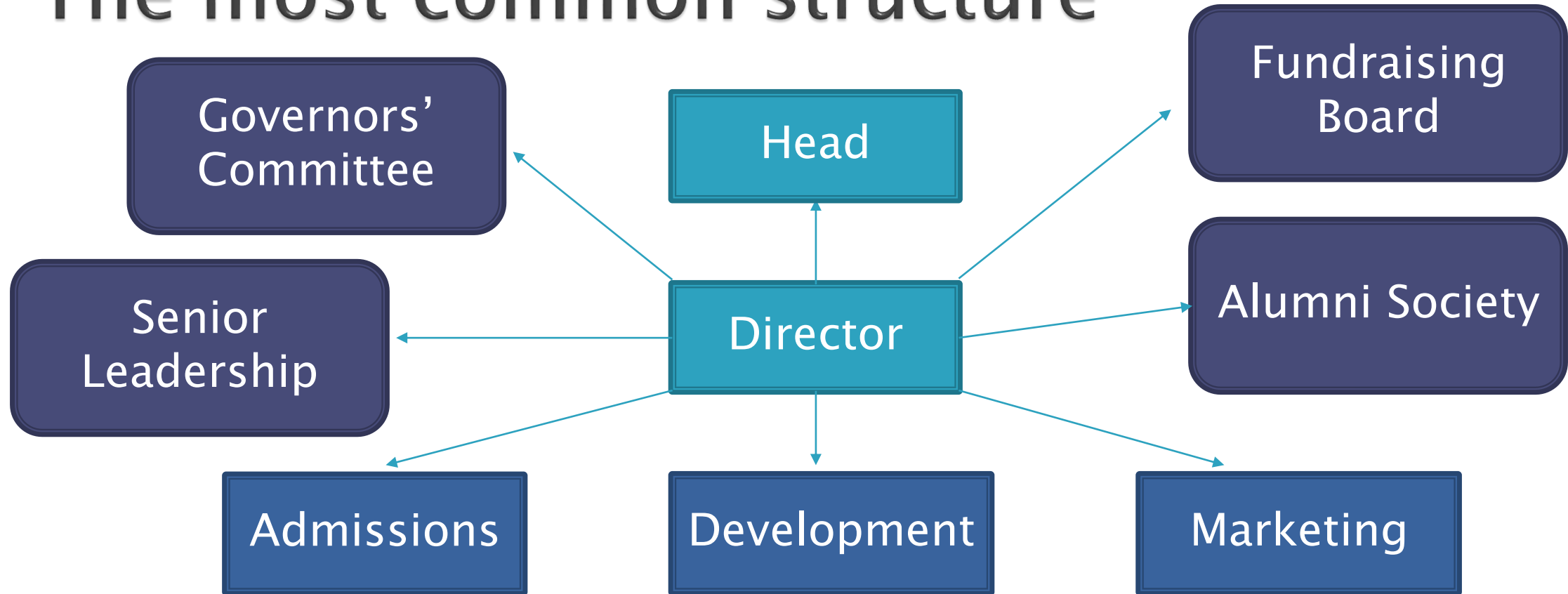
# Why do it?

- ▶ It's basically the same stuff, but different audiences
- ▶ Externally: more joined up communications and relationships
- ▶ Internally: better cohesion within school and less staff isolation

# But there are risks...

- ▶ One individual (or small team) overstretched
- ▶ Development falls by the wayside
- ▶ Requirements change over time with changing school priorities

# The most common structure



# The most common structure





# Case Study 1: Pangbourne College

## First & Second Year Goals

- ▶ Development: main focus (70% aim)
  - Pangbourne Association – alumni, parent and former parent groups
  - Start fundraising programme
- ▶ Marketing and Admissions: secondary focus (30% aim)
  - Update marketing and admissions practice
  - Get team working together

# Case Study 1: Pangbourne College

## First Year Reality (January 2016–17)

- ▶ Centenary Year Events: main focus (50%)
- ▶ Marketing and Admissions: secondary focus (40%)
  - Market Research (internal and outsourced)
  - Team / personnel management
- ▶ Development: third focus (10%)
  - Database work
  - Relationship building

# Case Study 1: Pangbourne College

## Second Year Reality (January 2017–18)

- ▶ Centenary Year Events (40%)
- ▶ Marketing and Admissions: second focus (40%)
  - Department restructure
- ▶ Development: third focus (20%)
  - Coordinating communications
  - Case for support / projects

# Case Study 1: Pangbourne College

## Third Year Reality (from January 2018)

- ▶ Development: main focus (50%)
  - Case for support
  - Legacy society launch
  - First capital campaign quietly starting
  - First development publication
- ▶ Marketing and Admissions: second focus (50%)
  - New website and communications focus
  - New Registrar appointment

# Tip 1: Keep the Big Picture in mind

The activities of the External Relations department must match the strategic priorities of the school.

This can sometimes take a lot of time to get right, and the priorities can change in the meantime.

## Tip 2: Prioritise *your* time first...

If you are the leader of the External Relations Team, you need to stay focused and make sure you are spending your time wisely.

This can be very difficult!

# Tip 3: ...and manage up, out and down

This means:

- ▶ Managing personnel on your team
- ▶ Managing expectations upwards and outwards
- ▶ Managing communication of outcomes and successes – internally and externally

# Questions for you:

- ▶ As a school, what are your strategic priorities?
- ▶ As a department, what are your priorities?
- ▶ Does the leader of the department spend their time focused on the priority areas?
- ▶ How can keep your community informed and engaged?



# Case Study 2: St Mary's Calne

## Priorities

- ▶ Development and Major Gift Fundraising
- ▶ Admissions
- ▶ And a little bit of Marketing

# Case Study 2: St Mary's Calne

## Identifying the Gaps

Cari says: “No one can be good at everything. I had to be honest with myself, identify the things I was not good at, and put someone in place who was good at those things.”

# Tip 4: Build the Right Team...

You can't do it all alone; you will need a team.

Self-motivated

Capable

Autonomous

# Tip 5: ...and then TRUST them!

Budget your personnel management time.

Allow your team to get on with it.

# Questions for you:

- ▶ Does your team fit the requirements of the school?
- ▶ If not, what can you do to change that?
- ▶ How do you manage your time?
  - What do you do well? What can't you do well?
  - What do you have time to do? What don't you have time to do?

# Case Study 3: St Peter's York

## Changing Priorities over Time

- ▶ Communications was primary focus
- ▶ Now Development is increasing in importance (specifically, fundraising)
- ▶ BUT, fundraising gets pushed down the priority order unless there is dedicated personnel and time.

# Case Study 3: St Peter's York

## Fundraising to the Fore

Hannah says: “When we amalgamated the departments several years ago, it made sense for where the school was at the time. Now, in order for fundraising to be a priority, I need a defined development stream which focuses on fundraising.”

# Tip 6: Fit fundraising into your team

- ▶ It can't just be the DoER.
- ▶ Good argument that fundraising and alumni relations should be two separate people.
- ▶ Senior people needed = investment of time and money



# Questions for you:

- ▶ At what stage is fundraising and alumni relations in your school?
- ▶ Do you have people dedicated to those streams?
- ▶ What about in five years' time? Will your fundraising and alumni relations streams have progressed? How do you see your team getting there?

# Finally...

- ▶ Keep the Big Picture in mind.
- ▶ Manage your time, relationships and communication.
- ▶ Get the right team on board.
- ▶ If you don't have a Development stream, it will be ignored.

**Always remember the 'Why'**

**Happy Juggling!**