

Development CoP

Calendar Crunch

Guest: Amy Schiffman, Giving Tree Associates
Facilitator: Jennifer Weinstock

Date: December 15, 2010

Goals of the Call

1. Discuss the realities of your annual campaign
2. Discuss the value of long term cultivation
3. Be honest about the stuff that gets in the way
4. Learn how to get back to the plan (or enact mid-term re-writes)
5. Make the next six months impactful



Amy Schiffman, MSW



In 2008 Amy Schiffman co-founded Giving Tree Associates (GTA), a consulting firm specializing in development strategies for non-profit organizations. Since founding GTA, Amy and her co-founder have served more than 25 local and national non-profits with successful board development, leadership development, fundraising and marketing strategies. Amy has spent 18 years as a professional fundraiser in the Midwest and most recently served as consultant to Chicago Jewish Day School (Pre-K through 7th grade), developing and implementing plans for its first formal annual campaign. WWW.GIVINGTREEASSOCIATES.COM



Annual Campaign in the Day School World

- **Short and sweet**

- 12 month cycle but really only 9 months in the school year. Factor in holidays etc. and it is really 7-8 month cycle of actual work time. What does this mean?

- **Keep the goals reasonable & manageable**

- Need to assume some of our leadership will not be available for all 12 months of the year.

- Manageable- use reality, what did I actually get done last year? Where will I get the biggest bang for my buck?

- **Focus on the big picture**

- Don't get caught up in the small stuff. Need to keep reminding ourselves of the big picture. Will what I'm doing now impact my big goal? Is this path of work related to a budget line? Cultivation does count towards the budget line.

Annual Campaign

What is getting in the way?

- **Managing tuition collection issues**
- **Keeping the attention of my key solicitors who are also solicitors for the larger Jewish community and other organizations**
- **Programming- getting involved in community building programs for parents and synagogue members**
- **Volunteers ask us to do things that we hadn't planned to do. The balance between staff and volunteer leadership.**
- **Delusion of time, pressing needs of day-to-day running the school**
- **Struggle between a plan of campaigns, fall, special and journal as opposed to seeing it as an annual campaign with one ask.**
- **Victims of our own success. Worked so hard for development to be integral to everything that happens and now we need to sustain that.**
- **Competing fundraisers from PTA, too many appeals for giving from too many different places.**

Throw Out What Is Not Working....

- **One way to get rid of non-development tasks... delegate.**
- **Just because you did it before doesn't mean you need to do it again.**
- **Need to break the pattern of events and mailings.**
- **The same goes for lay people. If they don't work and you are not immediately sure of their value on your team make a plan to review their status.**
- **If it's not in the plan, don't do it.**
- **Things that get in the way, small items from volunteers, see if there are other professional staff you can move them to.**

Delegate...But To Whom?

- **What to do in a 1 or 2 person shop?**
- **Expand thoughts on who you can delegate to, think outside the box.**
- **We are overworked and need help to get back to the big picture.**
- **It sometimes takes more nudging and follow-up than for us to just do it ourselves.**
- **Can you delegate to Head of School?**
- **Are there board members who are capable of taking on roles?**
- **Delegating is really tough, but if you don't invest the time to do it, the work will all remain on your plate.**
- **Think outside the box for the professionals who work at school**
- **Even involve the receptionist to go through the photo directory, file of best photos of cutest kids at school.**
- **Develop an understanding of whose job is it? What are the lines in the development role?**
- **Push back when its not your role! Say no when its not your job!**

Back to the Big Picture – Major Gift Cultivation

- **Wait for it...** be strategic on how you are spending your time. Spend time wisely, developing relationships that will turn into big dollars.
- **The pressure to close** how do you respond to the pressure in annual campaign? You have to keep your eye on the long term growth potential. Talk to your Head of School and Board about the value of spending time on relationship building. If you want me to raise more money, I need to outsource events and logistics. It takes resources to develop resources. You need to give a new position 2 years.
- **Calendar for the “top 10” (or 20)**
- **Stewardship** Same as cultivation calendar. Remember to say thank you strategically. Include donors on your calendar! Be the organization on their minds. Stay in touch! Bring donors into the school strategically.
- **What’s your board doing?** Have the development committee take charge of several of these activities. Your board should be raising 20-50% of your annual fund through their personal gifts and through their contacts and solicitations.

Calendar for the top 10 donors and prospects

How important it is to cultivate these relationships?

Where does this fit on your to-do list?

How do you organize your thoughts and time in order to do this work.

What might be on that calendar?

Names of prospects and donors, when and how will we be in touch.

Put this together at the beginning of the year.

Holidays- use that as a natural start to the calendar.

Birthdays- significant personal milestones.

Specific community programs that will attract alumni.

Using what you are already doing, put it officially on the calendar to make an official cultivation activity.

1-2 in-person meetings that are not solicitations.

Make it a formal plan.

Including teachers and staff so everyone understands how to make you aware of cultivation and stewardship opportunities.

I'm Spending Too Much Time On...

Annual Report

Communications Materials

Events

Website updates

Alumni mailings

Getting good data

I'm Spending Too Much Time On...

(gala, adbook, auction, capital campaign, direct mail, website, etc.)

- **Prioritization** How much money does each task or set of tasks bring in? Make a list each week, assign each task to a category. Rocks, Pebbles or Sand. Rocks- critical big things, Pebbles, not critical, sand is everything else. Don't go to pebbles or sand w/o completing the Rocks list.
- **Time management** Write down everything you do and how much time you spend on it. It will become readily apparent what needs to move off your list. Review this with your Head of School.

I'm Not Spending Enough Time On...

- **Covering the markets**

(parents, GP's, alumni, board, community, corporate, foundations)

What is falling through the cracks?

This list assumes you have more than 1 person on your dev. Team. Very hard to cover all these markets with only 1 professional.

Incorporate all of these markets with a strategy but be reasonable.

Major gifts should come from all of these markets.

Set goals in each of these categories for your annual fund.

If It's Not In The Plan, Don't Do It

(with a few exceptions)

Stay focused on the plan.

Re-direct ideas you get to the PTA or other places

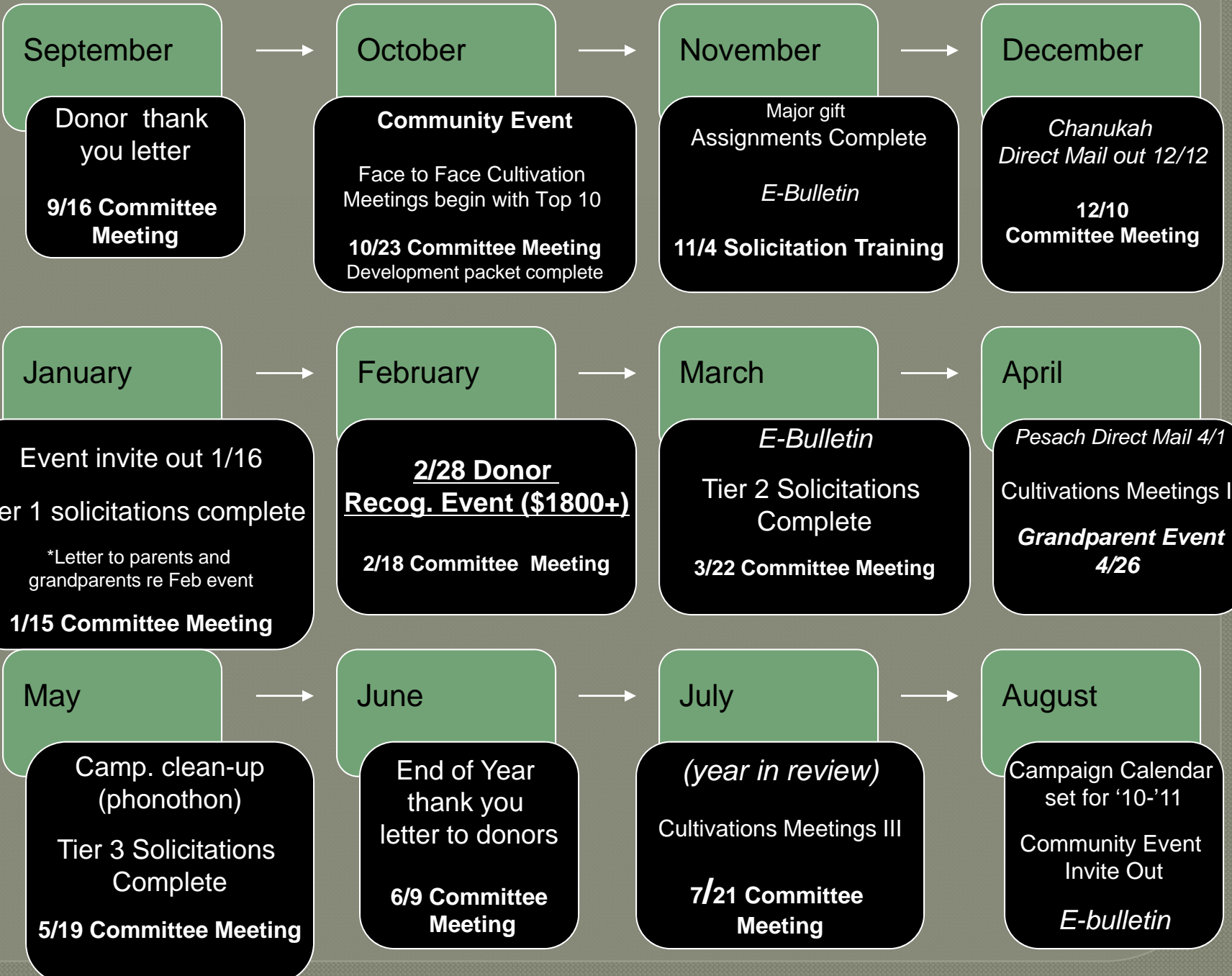
Be confident to say no!

Ask for your Head of School's support to explore an idea later or next year.

My Campaign Plan – With Six Months to Go

- Sample calendar
- Making the most of your strengths/resources (human and otherwise)
- Progress reporting
- A word on events

Sample Development Calendar 2009-2010



Thoughts, Questions, Next Steps

Positive ways to muster volunteers over the summer.

Back to school theme.

Ask for pledges over the summer but they can pay them at end of year.

Use federation black-out to develop relationships with new donors.

Having donors and prospects physically tour the building to see what we do.

Dev. Professional gets the meeting on the calendar and Head of School does the meeting.

“How to gain control of your time and your life” a book recommended by Shulamith Elster.

Use a day to clear the desk of sand.



Next CoP Call

Tuesday, January 25, 2011
1pm EST
with special guest, Herb Tobin

Watch the Google Group for
upcoming call details.



New! CoP Office Hours

Join together with Jennifer and colleagues from the CoP for informal conversation

Thursday, January 13, 2011
12noon

Watch the Google Group details.

**Thank you to
Amy Schiffman**

**Giving Tree Associates
amy@givingtreeassociates.com**