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# Setting Up a Development Office

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Thank you for joining, the webinar will start at 14:00 (GMT)

When the webinar starts your microphone will be muted, but you can use the chat box to ask questions during the webinar, and at the end there will be time to answer these questions.



# Hello!

## Rachel Hadley-Leonard

- Background in education & marketing
- Teacher & Senior Leader– Maintained & Independent Schools
- Marketing in industry – Retail and Service Industry
- Marketing & Development in schools – roles inc. Marketing Manager, Head of Marketing, Alumni Relations Manager, Director of Development Schools' Development & Marketing Consultant

### Currently:

- Independent Schools' Development & Marketing Consultant
- Immediate Past Chair of Admissions, Marketing & Communications in Independent Schools (AMCIS)
- Judge for UK Times Educational Supplement Independent Schools Awards
- Judge for global InspirED Brilliance Marketing & Fundraising Awards
- Contributor to UK All Party Parliamentary Group for Independent Education





# Start-ups - Setting up a Development Office

- Thinking about it?
- Just started out?
- A little way down the road?
  
- Important steps to consider
- Practical advice to help avoid the most common pitfalls



**Know why you have set  
off and more  
importantly...**

**...where you want to go!**

- Why are you setting up and what do you want to achieve?
- Do you want to fundraise or friendraise? Or both?
- How soon do you want to achieve your goals?



# The Feasibility Study

- How does your community feel about your plans?
- How much money/goodwill can you raise?
- Do you have potential donors?
- Is your target achievable?
- How long will it take?
- How much will it cost you to achieve your goals?





# Your history matters

- What previous fundraising has taken place?
- How did your community feel about this?
- Was the campaign successful and if not, why not?
- Are there any bad memories?
- Do you have donor details?
- Has the culture of giving changed?



# Two essential documents

Case for Support  
Strategic Plan





## Who is on board?

### Creating governor/trustee buy-in

- Share research, benchmarking & CPD feedback
- Involve in creating KPIs & present annually
- Development Director on Leadership Team
- Invite (and expect) governor/trustee attendance at development events
- Send governors/trustees on relevant courses
- Invite key governors/trustees onto Fundraising Board



## Getting your colleagues on side

- Explain who you are and what you will be doing
- Explain how development will benefit them
- Involve in event planning and invite to events
- Encourage colleagues to tell you stories about your alumni
- Put out a plea for alumni archive material
- Feature long-serving colleagues in alumni newsletters
- Find out and use their skills - from proof-reading to music to video creation
- Take a regular slot at staff training days/INSET
- Make time to go to the staff room at break/lunchtimes



## Creating a culture of philanthropy

- Enrichment Programme
- House & whole school assemblies
- [https://www.youtube.com/watch?v=oGX\\_CxRITfQ](https://www.youtube.com/watch?v=oGX_CxRITfQ)
- Sixth form philanthropy prefects
- Building on existing charitable ethos
- Celebrate donors with donor reports & events





Friendraising,  
fundraising...

... or both?

The perfect mix!



# Resourcing your office

Development Director  
Head of External Relations  
Head of Fundraising  
Events Officer  
Stewardship Manager  
Head of Philanthropy  
Philanthropy Officer  
Development Assistant  
Head of Major Gifts  
Volunteer  
Database Administrator  
Database Officer  
Alumni Relations Officer  
Development Officer



# Resourcing your office

Appoint people, not qualifications

Priorities!

Differing skills sets

Staff increases linearly from 1.4 to 3.6  
with age of office\*

**You + data admin = 😊**

\*Schools' Fundraising and Engagement Benchmarking Report 2018-IDPE/Graham Pelton



# Managing expectations

The biggest issue for new offices

## The problem

Unrealistic expectations

Misunderstanding the role/purpose

Apples and pears

## The solution

Feasibility studies

Commonly agreed targets

Comparable benchmarking

Regular feedback

Governors/trustees on Board

# Managing expectations

2.3 years

Don't be a statistic!







# Data – The importance of getting it right from the start

The 'run over by a bus  
strategy'!



# Databases

## What do you need?

relationships  
donors  
CRM  
comms  
fundraising  
records  
events  
mentoring  
information  
email  
volunteers  
payments  
newsletters  
careers  
history



# Data

## The problem

Multiple sources of information

Inaccurate data

Lack of time

Haphazard approach

Expensive two platform approach

## The solution

CRM from day one

Intuitive system which makes accuracy and  
meticulous data entry easy

Back and front end platforms in one

A CRM which handles all development needs

**Good housekeeping = good results!**



# Challenges & outcomes – The first year

## Challenges

Unrealistic expectations  
Impatient governors/trustees  
Data issues

## Outcomes

Warmth towards the School  
An expanding community  
Unexpected support  
Donors!

## Pitfalls to Avoid

Rushing strategy  
Rushing data  
Rushing asks  
Rushing campaigns  
Rushing....





# Summarizing the nuts and bolts

- ★ Knowing why!
- ★ Feasibility
- ★ Your school's history
- ★ Case for Support & Strategic Plan
- ★ Creating Buy-in
- ★ Friendraising v Fundraising - Getting the balance right
- ★ Resourcing the office
- ★ Managing expectations
- ★ Data, data, data!

# Questions?



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# About ToucanTech

ToucanTech is an easy, affordable and beautiful fundraising CRM and website software to manage your supporter records, email newsletters, online payments, events, mentoring, careers and more!



**Any questions?**

Please contact Amy – [amy@toucantech.com](mailto:amy@toucantech.com)  
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