

Establishing a Development & Alumni Relations Office in Prep Schools

Watch the webinar here: <https://youtu.be/GuBJid7YWyo>



Establishing a development and alumni relations office in a Prep School

Rachel Hadley-Leonard – RHLConsulting



Hello!

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

Currently:

- Independent Schools' Development, Marketing & Admissions Consultant
- IAPS Consultant
- Former Chair of Admissions, Marketing & Communications in Independent Schools (AMCIS)
- Professional mentor and coach
- Judge for UK Times Educational Supplement Independent Schools Awards
- Judge for global InspirED Brilliance Marketing & Fundraising Awards



Rachel Hadley-Leonard

Setting up a Development and Alumni Relations Office

- Why it's different for Prep Schools
- Alumni relations, development, or both?
- Important steps to consider
- Practical advice to help avoid the most common pitfalls



Is it really harder for Prep Schools?

Four main challenges

- You're one of 3 alma maters!
- Communication – parent or child?
- Events – keeping them engaged
- Development/fundraising – a very long game



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?
- How soon do you want to achieve your goals?

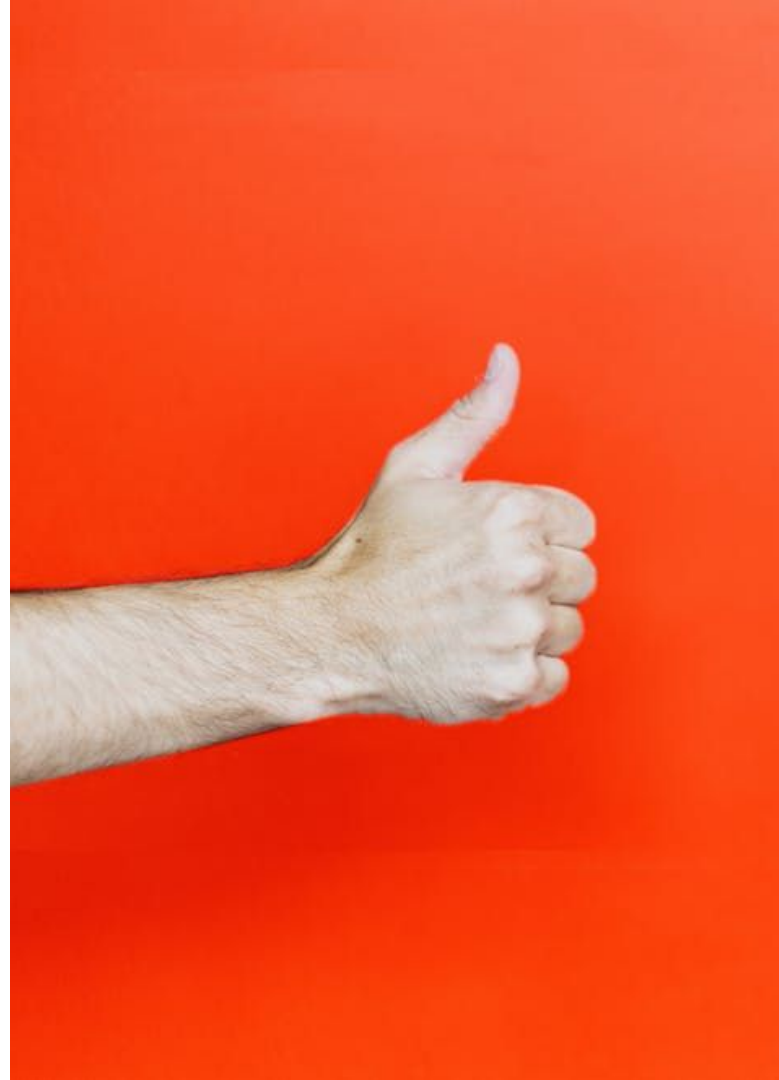


Alumni relations, fundraising...or both?

The perfect mix!

Consider:

- Long term goals
- Current levels of community engagement
- Pressure from Governors/Head/SLT



Alumni Relations first...

Moulsford Preparatory School

MOULSFORD PREPARATORY SCHOOL

OLD MOLES

HOME - MOULSFORD COMMUNITY - OLD MOLES

More in... **MOULSFORD COMMUNITY**

[Moulsford Parents Association](#) [Old Moles](#) [Charity](#) [South Africa Rugby Tour](#) [Career Opportunities](#)

Our Old Moles are very proud to have attended Moulsford and many enjoy hearing about developments at the school as well as catching up with news from old friends and teachers.

The Old Moles Society has been running for just over a decade, and is made up of former pupils and staff of Moulsford. It enables them to retain a connection to the school, and to keep in touch with friends and colleagues.

We always welcome news from Old Moles, and would be delighted to include your contributions in the newsletter. Please keep in touch via alumni@moulsford.com or search the hashtag #oldmoles on social media.

[OLD MOLES WEBSITE](#)

The Society operates on-line and registration allows Old Moles to receive and access the annual newsletters, receive invitations to reunions and to access the database for other Old Moles' email addresses. Some boys may prefer to keep their email addresses confidential and choose the privacy option on the form. Once registered, the Old Mole will receive a User Name and Password to enable him to use the site.

Do spread the word to all Old Moles and remind them to register here. Once signed in, you can access photos from previous reunions as well as the online newsletter.

[LOGIN](#) [REGISTER](#)

We are always delighted to hear from Old Moles as to where their lives have taken them, and as to how their Moulsford education has influenced their chosen path. See some real life stories from Old Moles, to help you imagine where a Moulsford education could lead your son.

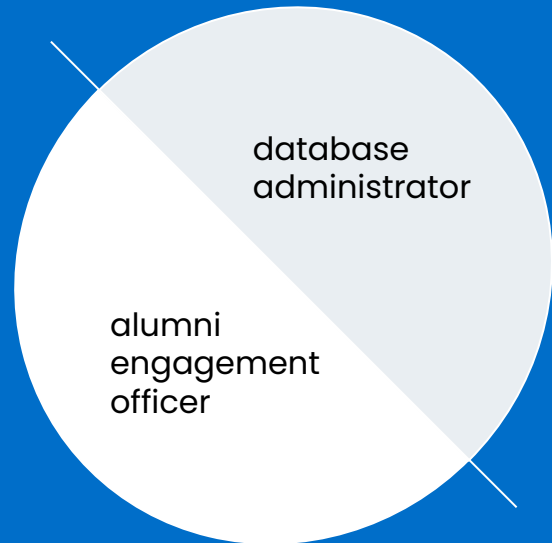
See our... **RELATED STORIES**

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Resourcing your office – getting the basics covered

- A budget
- CRM database
- At least half a person!
- Ideally two halves – alumni engagement & database administrator



Resourcing your office

- Appoint people, not qualifications
- Priorities!
- Differing skills sets
- Staff increases linearly from 1.4 to 3.6 with age of office*

Alumni engagement + data administrator = 😊



Data

The problem

- Multiple sources of information
- Inaccurate data
- Lack of time
- Haphazard approach

The solution

- Engaging, efficient 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 both alumni relations AND development needs

Good housekeeping = good results!



Getting your colleagues on board

- Explain who you are and what you will be doing
- Explain how alumni relations/ 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



Do your research!

The first six months

- Archivist
- Former parents
- Current parents
- Former pupils
- Former staff
- Current staff
- The wider community

And don't forget... **Pupils!!**



Keeping your Prep school alumni engaged

- Build and maintain relationships with parents
- Hold regular events for families
- Invite alumni back to school
- Communicate regularly
- Ensure they sign up to you online community aged 13+

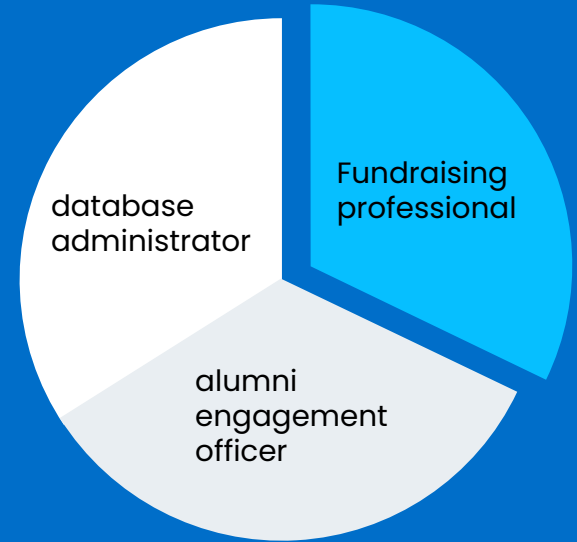




Fundraising too?

Resourcing your office – getting the basics covered

- A budget
- CRM database
- Ideally three thirds– alumni engagement & database administrator & fundraising professional



Fundraising?

Do your groundwork...or in other words, a feasibility study

- How does your community feel about your plans?
- Do you have potential donors?
- Is your target achievable?
- How long will it take?
- How much will it cost you to achieve your goals?
- What will the ROI be?
- Any skeletons in the cupboard?



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

1. Case for Support
2. Strategic Plan



Creating a culture of philanthropy

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



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 alumni relations development events
- Send governors/trustees on relevant courses
- Invite key governors/trustees onto Fundraising Board



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

2.3 years – Don't be a statistic!



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

- It's harder for Prep schools – be prepared!
- Friendraising v Fundraising – Getting the balance right
- Resourcing the office
- Managing expectations
- Data, data, data!
- Feasibility
- Your school's history
- Case for Support & Strategic Plan
- Creating Buy-in



Questions?



Rachel Hadley-Leonard

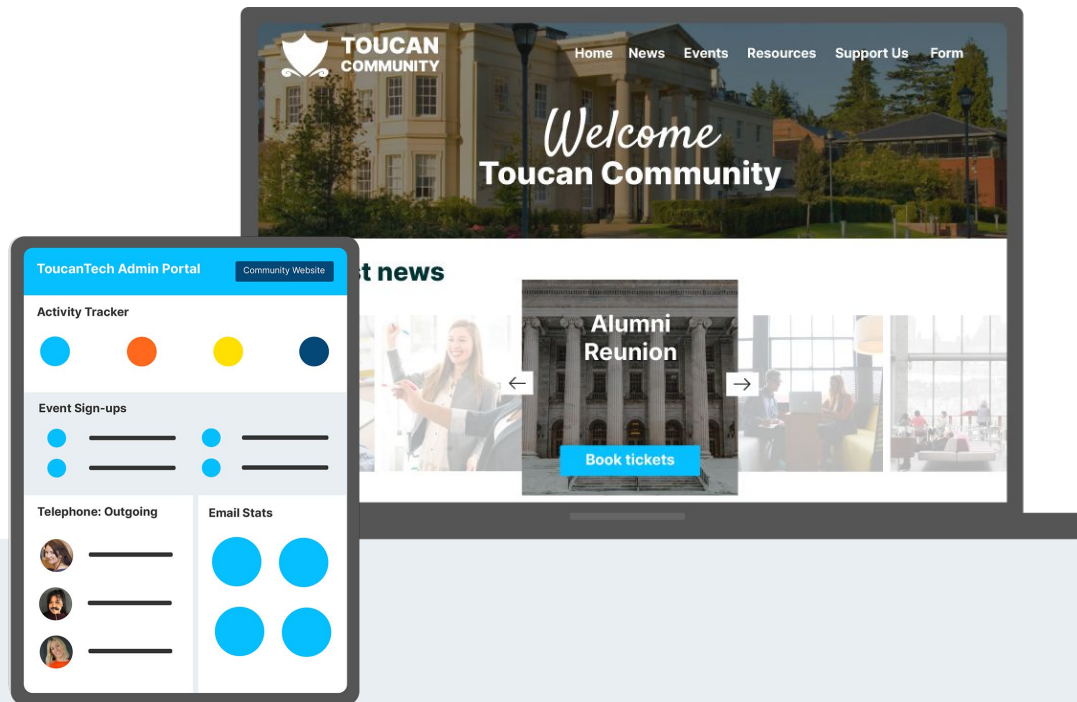
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The only community and fundraising software with a CRM, website and member portal/app.



Any questions?

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