



Word Scramble

Question: Why did the volunteer succeed at the phone-a-thon?

Unscramble the words below with one letter per square. They are common development terms.

L	O	H	C	S	O			
○		○						
S	E	T	U	T	R	E		
○					○			
D	O	W	N	M	T	E	E	N
		○		○		○		
P	A	A	I	G	N	C	M	
	○					○		
C	I	K	F	O	F	K		
	○					○		



Rearrange the circled letters to find the answer. Solution can be found at the end of this document.

Answer: ○○ ○○○ "○○○○○○○○○○" .

Now is a Good Time

Have you put a project on hold or are you waiting for a "better time" to start something you had planned to do this spring or summer? There are lots of things we never get to in the development world, or at least don't give the kind of time we wish we could. Maybe now is the time to:

- **Clean your office**—all those files you keep meaning to sort through in the cabinets and online. As for financial records, a good rule-of-thumb is to keep the current year, plus 7 years. Other files can be maintained as space allows. Enter outstanding anecdotal donor information into their profile.
- **Give special attention** to your top volunteers—take them to lunch or send out personal cards. Let them know how much you depend on and appreciate them.
- **Get to know your trustees**—spend some quality, one-on-one time with each new member, and with those you don't really know. How nice to be meeting with these people and not asking for money. You're there to thank them for their time, and get to know them.
- **Review the development plan**—sometimes this is a summer project, but if time allows now, get it started. Chances are there may be some adjustments for the balance of the year. And no time like the present to begin that thought process with your staff.
- **Communicate with top donors**—it is always nice to be in touch with a good donor when you are not just thanking them for the most recent gift and asking for the next one...so now is a good time to make sure they know how much you appreciate what they do for the school.

Summary of CASE/NAIS Survey

In late November, we conducted a survey of independent schools to see how they were handling the economic crisis and what effect it was having on the development program. Visit our website for the full results.

Some of the key findings were:

1. Many but not all had communicated with their constituents to assure them that the school was in good shape financially.
2. Those who were planning a feasibility study decided to delay the study until the first quarter of the year. In most cases, they are now pressing on with those plans.
3. Those who were conducting campaign solicitations decided to put that activity on hold until the first quarter of 2009, spending their time cultivating and educating prospective donors.
4. Further discussion with schools at the CASE/NAIS conference, supplemented by an excellent article in the January issue of *CASE Currents*, confirms that, once other steps have been taken, the schools' primary responsibility continues to be one of ASKING for the gift. Please contact us or CASE for a copy of the article.

We Are Responding to Your Tighter Budgets

In this economy, we know our services may be needed at the same time that many of you are being asked to pare your expenses. We are listening! For our online subscribers ONLY, we're offering special limited pricing on our Development Assessment and Executive Search.

- **Development Assessment**

Times are tough and budgets are tight, but maybe **now more than ever** you need to be sure you are **maximizing your fundraising efforts**. We are offering a **20% discount** for Assessments that are booked by June 1st, to be conducted by September 1st. (We have scheduling available for 3 schools only—be the first to lock in your assessment dates!)

Our Assessment is an in-depth review of your development operations, including everything from annual giving to volunteer management. Two of our consultants will spend the better part of two days on your campus, interviewing staff and volunteers, and reviewing publications and documents. We'll give you a report listing your strengths, but more importantly telling you what you can do to tighten your belts and be more efficient.

- **Executive Search**

Regardless of these unsure times, there are many of you who may still be looking for candidates for those open development positions. We would like to assist you with your search for a new development professional, whether it's the Director of Development or another development position. With a larger pool of candidates looking for jobs now more than ever, we can relieve your burden as follows:

1. creating the right job description and compensation package;
2. advertising/marketing the position;
3. collecting and processing resumes;
4. screening appropriate candidates; and
5. referring the best ones to you.

If you contact us to begin your search between February 23rd and April 30th we will reduce the rate by 20%.

Email rocky@fordassociates.com for more information.

Do You Need a Part Time Director of Development?

Are you are looking to change the structure of your development office, but aren't quite sure of the right direction? Do you have someone who's filling in but has other responsibilities? Or is the timing or budget not quite right to actually hire that full-time person you need? We can step in and act as your Director of Development, while helping you assess your office situation and ultimately helping you find your new Director.

Depending on your needs, one of our consultants would work with you on-location. The schedule would be set so that our consultant could attend appropriate meetings and have time to work with office staff on current and future projects. Contracts are in three-month increments, so you could hire us for three, six, or nine months.

At the end of the contracted time, we would provide you with an in-depth assessment of your office, including the staff direction recommended for the future. If you are interested in hearing more about this service, please email becky@fordassociates.com.

Development Coaching for Heads

Our new Development Coaching for Heads is predicated on the fact that many new and existing heads feel as if they're unprepared for the development demands of the job. Often, they have come through the academic ranks and the fundraising/sales/marketing side of the job is uncomfortable or unfamiliar for them.

Here is an example of how we might help:

Christine had been a teacher in a public school, where funding was someone else's concern. She went to work for an independent school, and over the course of working for two other independent schools, began the academic-to-administrative ascent: department chair, division head, dean of students, academic dean, assistant head, and finally Head of School. The only thing lacking was development experience.

When she interviewed for the Head's job, the Search Committee assured her that her lack of development experience wasn't going to be a problem because what they really needed was her strong academic background. Her interview with the Director of Development went fairly well. She was told that the Development Committee was ready and willing to bring her on board. So she accepted the offer...

After settling into her new position, she was surprised to discover that, in reality, the Board's expectations of her exceeded what the Search Committee had led her to believe. She had inherited a Development Office that was in disarray. The Trustee Development Committee hadn't met in more than a year. There was debt from a previous capital campaign. The Board just didn't like to raise funds, and because of this discomfort, the Board had really expected the Head to make the calls. Potential donors had been ignored. All in all, things just weren't as they had appeared.

Does this sound familiar? Enter FORD & ASSOCIATES. We understand and we have the solution. Our service consists of the following:

We will spend time with the Head, identifying and prioritizing the issues. ● This may include a meeting with the Development Committee, working with the Board to raise their comfort level with fundraising. ● We will facilitate a meeting with the Development Committee, and conduct an assessment of the Development Office. ● This may lead to hiring a new Director of Development with which we can assist. ● We'll train the Head and any other volunteers on how to make the ask, and what not to say! ● We'll do whatever's necessary to assure that on his or her watch, development becomes an area in which expectations are realistic and results can be seen. ● We will meet with the Head every other month.

Do you have additional concerns? We welcome the opportunity to discuss them with you, and find a way to enable your Head to become more confident and capable with regard to development responsibilities.

Word Scramble Solution:

SCHOOL TRUSTEE ENDOWMENT CAMPAIGN KICKOFF

HE WAS "GIFTED."