

**BE THE ONE THAT CALLED**  
**What Independent School Development Teams**  
**Should Be Doing to Prepare for Fall Amid COVID-19**  
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School systems just finished arguably the most challenging obstacle that they have ever been faced with. Literally overnight, the entire enterprise pivoted to 100% online learning during a worldwide quarantine and somehow did so (at least to those on the outside), seamlessly. At independent schools that also meant that admissions and development departments pivoted just as quickly, having to adapt otherwise very personal interactions to meaningful virtual touches. Whether you would categorize your school as having passed with flying colors or hobbling across the finish line, you finished. Congratulations! Celebrate the victory and take a breath.

But what now? With so many unknowns regarding COVID-19 and how (when?) it might affect the fall; school development officers are faced with an enormous task - preparing for an uncertain fall without a playbook. Here we share the best tips from Our Fundraising Search's coaching sessions on this very topic.

### 1. Stewardship

This summer is the perfect time to make a concerted effort towards stewardship of your donors. And since this can be accomplished both in-house and remotely, there is no excuse not to excel at this task. Run the list of last year's Annual Fund donors and set aside 30 minutes a day to make calls. Ask how their family is holding up and if there is anything the school can do to help. If possible, split the list between the development team, Head of School, Development Committee and/or Board members to spread the responsibility. Yes, write the notes and send the emails, but that personal touch of calling and checking in with no other agenda will speak volumes as to the care and commitment you have for your donors. During a recent staff call, it was realized that of all the nonprofits personally supported by Our Fundraising Search Staff, only one organization had reached out via phone to check in with the individual during this season. Want to guess which nonprofit is currently on the top of that individual's mind. You got it - the one that called. Be the one that called.

### 2. Budgeting

Independent schools are budgeting for flat or decreased revenue across the board. While we certainly would not recommend increased development goals, we believe annual funds will most likely hold firm for those schools putting the work in. First, analyze that stewardship list you already pulled. What is being said on your calls about how they have been affected financially? Next, assign an ask amount for each individual based on these conversations, same as last year or decreased because of circumstances. Then make an informed decision regarding your overall annual fund goal. Now is also the time to reconsider each of those expense items. Instead of that pricey mailer, could a couple of major donor meetings offer the same result? Is the return on that event worth the expense and staff time? Times of turmoil are often the most advantageous for making big changes - like getting rid of that beloved event or yearly campaign that has run its course.

### 3. Annual Fund

Utilize this summer to prepare for multiple scenarios. If school is able to start in August with business as usual, consider launching the annual fund immediately. Morale will be at an all time high with parents excited for a normal school routine and abundantly grateful for their teachers' work this spring. Encourage support for the annual fund as a way to show appreciation for faculty. Development officers should also be prepared for a delayed or staggered start to school, with an October or November annual fund launch. In this scenario, morale should be closely monitored, as well as scheduling in conjunction with holidays.

No matter when you launch your annual fund, you should strive to run it on a shortened timeline. Many schools have already moved to a 30-day (and some even 10 day) parent campaign. Should schools start in the fall only to go back into quarantine, wrapping up your annual fund quickly could be a make or break scenario for your development efforts. If your school has not already explored a shortened timeline, now's the perfect time to experiment. Also, take the time to sit down with the leadership team to explain the plan and together create a communications timeline that ensures the annual fund has prime marketing for those short few weeks. Parents will appreciate not being inundated by multiple asks at the same time and the annual fund will be established as parents' first and most important gift to further their students' education.

Lastly, parent volunteers will be even more important than ever. Secure and train the Parent Chairs and Class Representatives this summer as they will be your mouthpieces in the community. Never underestimate the power of a parent peer talking up the importance of the annual fund during a parking lot conversation.

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