



PEJEGFA Conference #2

CASE STUDY

Time Management for the Development Director

For Tuesday February 9, 2016

Allison is the Director of Development at a Pre K-12 modern Orthodox day school in a large metropolitan area. Her staff includes a part-time administrator who she shares with the Admissions office and a part-time Alumni Coordinator. The school is coming upon its 50th anniversary in two years.

It is a Tuesday morning in March. On Allison's calendar at 8:30 a.m. is a breakfast meeting with a major donor whose gift for this annual campaign has not yet been closed for the year. While she is driving to Starbucks to meet the donor, she gets a text from the board member who was going to meet the two of them. He says that he has to get to the office, an emergency. She decides to meet the donor anyway but she knows that the gift will never be closed without the board member. The donor is clearly irritated that he shows up and that the board member does not. Allison schmoozes for a while and asks the donor when they can reschedule.

Annoyed, Allison gets back into her car and heads back to school while in the car she puts in a call to her admin to say she is on her way. Her admin lets her know that their fundraising system is down, again and that she has no idea how to fix it. Allison tells her to call the IT company. As Allison is pulling into the school parking lot, she gets a text from the principal of the lower school that today is a Purim shpiel rehearsal by the fourth graders. He thinks it would be great for the weekly newsletter and that "someone" should take photos. Allison asks what time it's taking place and says she will come for the last fifteen minutes.

On the white board in Allison's office is a tally of the annual campaign goal. The overall goal is \$1,150,000. Every day she must look at that goal. Every day she feels like it is farther away. Today she sits down in her chair, coat still on and she fights back nausea realizing that there is still \$625,000 left to raise with barely three months to go and Pesach in between.

She picks up the phone and calls her HOS to try to see him today as they have not met for over a week. They need to get organized around raising the rest of this money. He says he can see her tomorrow in the late afternoon. She says she will have to change a meeting with her Development Chair. He says why don't we all meet together? She is reticent but agrees. Now she will have to prepare reports for the meeting and the system is down. She's not sure she can get together the data she needs anyway because enrollment letters were going out and her admin is never caught up on entering data for Development anyway. She will have to stay late tonight and do it manually.

Allison goes to the fourth grade class and takes photos. Boy, those kids were cute and that new young teacher did a great job with them.

Allison goes back to her office and closes the door. It is after 1:00 now and she has to pick her kids up in two hours, get them to aftercare and then get back to school to get her reports done for tomorrow's

meeting. She starts writing invitation copy for the donor appreciation event because the deadline from the graphics person is today. She is confused as to how the names need to appear on the invitation so she calls one of the members of her Development Committee. That call lasts for nearly thirty minutes as this committee member is a parent in the school and wants to get her ear about problems with the parking lot.

By now it is 3:00 and she has to get her kids. Luckily, they are both feeling well and happily go to the aftercare program. By 3:30 she is back in the office and she is opening the mail. There are only two checks after she has opened 17 pieces of mail. The checks are payments of small pledges. She can't even reduce her campaign total by \$500. At 4:00 Allison begins making a few calls to try to make appointments with current donors who have not been contacted yet this year. No answer. She leaves a few voice mail messages and goes back to the invitation copy that is due by 5:00. There's no time to clear the copy with her Development Chair so she figures she will just let her see it tomorrow when she has her meeting with the Chair and her HOS tomorrow.

Allison feels exhausted but knows she has to try to get reports together for the meeting the next day. The system is still down but she sees a note in her mailbox that the IT person will come tomorrow afternoon. So she sits down and by hand starts to reconstruct the data she needs to give people a positional analysis. It's not quite right but it will have to do...it's time to pick up her kids and get them home for dinner.

Identify the key problems that must be solved.

Identify problems that are less central for still deserving of attention.

What are your recommendations that address the problems you have identified?

What are your recommendations to implement your recommended course of action?

How might these recommendations be perceived by each stakeholder?

What are the essential difficulties posed in this case?