

5 Summer Tasks That'll Set Your School's Development Office Up for Fall Success!

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It's almost here...Summer Break! With the school activity calendar coming to a grinding halt, the hallways quiet (for once) and the number of external interruptions diminished by the sheer lack of people on campus, the development office has a short reprieve to its school-year long race to the finish line. While a change of pace is welcomed, and needed, don't let the opportunity this time offers slip by into what we call the "summer slump". Take advantage of the slow-paced schedule of summer at a school and set your team up for success this fall!

Here are 5 summer tasks that are sure to set your development office up for success in the fall:

1. **Development Planning**

Take time today, before school gets out, to schedule 1-2 days in early June to review (or write) your annual development plan. Invite your entire team to be a part of the process. Ask the hard questions: What worked this year? What didn't go as planned? What are we hanging on to for "tradition's" sake, but isn't as effective as it used to be? Ask the fun questions: What's a new idea (big or small) that we'd like to try next year? What are areas of growth and expansion we might want to tackle in the coming years? Then fill in all the details: Who, what, when, where and how. If a review of your development efforts, and subsequent writing of the plan, hasn't been an annual practice, this is the summer to change that! If you need some further direction, check out Chapter 3 in our newest book [Fundraising For All](#) for a sample development plan. When scheduling this time of planning, consider comfort. People tend to provide more open feedback and be inclined to think outside the box when they're comfortable. The most effective annual planning sessions I ever had with my team was away from our offices, in comfortable clothes, with plenty of snacks. A change of scenery and permission to share freely not only creates an environment where everyone feels safe to contribute their thoughts, but it also creates buy-in - which comes in handy when fall hits and everyone's on board with the plan!

2. **Get a Head Start on Fall Materials**

With a detailed development plan shored up in early June, you'll already have a task list a mile-long. Why not spend the summer knocking out tasks that don't have to wait? Marketing materials for the annual fund such as pledge forms, flyers, signage and social media posts can all be created this summer and filed away for when you need them. Solicitation letters, gift acknowledgements and pledge reminders are other time-consuming tasks that can easily be completed this summer when there's less distractions. While spring events may seem exceptionally far away now, we all know time flies. What tasks can be accomplished now to make that spring golf tournament, gala or auction easier on your team?

3. **Summer Refresh**

Make this the summer of a fresh start! Clean out files, declutter the storage space, and spend

time cleaning up the database. There is tons of research that shows clutter affects our mental health and, in a work environment, can lead to decreased productivity. According to [research](#) released by Joseph Ferrari, a social-community psychologist at DePaul University, “office clutter negatively affected...satisfaction and pleasure from work, and increased the likelihood of burnout and tension.” Citing this [Harvard Business Review article](#), “The physical environment of the workplace has a significant effect on the way that we work. When our space is a mess, so are we. [Research shows] that our physical environments significantly influence our cognition, emotions, and behavior, affecting our decision-making and relationships with others. [O]ne international [survey](#) showed that information workers lose up to two hours a week fruitlessly searching for lost digital documents.” While you’re at it, is the development office in need of some fresh paint and office furniture? There’s something to be said for an inviting office when welcoming donors.

4. **Learn Something New**

We all know how important on-going professional development is. However, the constant demands on our time often make it difficult to pull away for even a few hours...and next thing we know, a year or more has gone by and we never took that class, sat in on that virtual workshop or left the office for a networking meeting. Summer is the perfect time to schedule these. If you are a supervisor, build this into your budget and employee performance plans and encourage your team to take the time to further their skills. It will only benefit your team and the school. This interesting article by [Piedmont Healthcare](#), outlines a number of benefits to consistently learning new things, including personal motivation, boosting confidence and boosting health and happiness. One that particularly stuck out for the work environment is that “It helps you be flexible. By consistently educating yourself and trying new things, you’ll learn you’re capable of change and growth, which keeps you open to new opportunities in life. ‘Learning a new skill can get you out of a rut. If you don’t learn new skills, you can start to wither a bit mentally and physically because you’re falling victim to the same habits and mindsets again and again.’”

5. **Team Check-In**

How’s everyone doing? It was a long year. No matter how well it went, your team is inevitably experiencing some drag. Spend some time out of the office with each team member and really engage them in a conversation of how they’re feeling about their roles, where they see themselves in 2-5 years and how you can help them get there. There’s much to be said in research about employees’ contentment in their job being correlated to company culture, bosses who show appreciation and mental health related to work/life balance. Take a few hours, or a whole day, and do something fun as a team. It can be as simple as picking up lunch and having a picnic on a pretty day to booking a fun off-site activity. The goal is to have fun, not talk about work, and build relationships outside of job titles and responsibilities. Some might read this and think it’s frivolous, but we think it is vitally important to the overall effectiveness of a team - especially once fall hits, everyone’s back on campus, and the fast-paced school calendar is in full swing.

This summer, make it a point to set yourself and your team up for optimal success for the coming year. By taking the time now to outline your team’s summer “to do” list you’ll offer your team the gift of a much less chaotic fall.

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