

Working with Your CEO, Board, and President on Major Gift Fundraising

Presented by:

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Fundraising • Development Services • Strategic Consulting

Today's Presenters



Tracy Conte

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New York-Presbyterian/Lawrence Hospital



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Principal & Managing Director
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Lawrence Hospital Center

- Located in Bronxville, New York – 30 minutes north of Manhattan
- \$200 million operating budget
- 2013 – 2014 Capital Campaign to build a new oncology and surgery center with six (6) new operating rooms, state-of-the-art oncology services, and campus renovations
- 2013 Campaign followed another fundraising initiative that was conducted in 2009
- 2013 Campaign highlights:
 - Average gift increased 3X from the 2009 campaign
 - Major gift level was \$250,000 in 2013 versus \$100,000 in 2009
 - 61% of total raised from \$250,000+ gifts versus 22% in 2009

Today's Webinar

- I. CEOs, Presidents, and Fundraising
- II. President's Role in Fundraising
- III. Feedback from Institutional Leaders
- IV. Actual Feedback from College President
- V. Board Responsibilities
- VI. Expectations of Board Members
- VII. Actual Feedback from a Board Member
- VIII. Common Issues and Challenges
- IX. Feedback from CDO
- X. Ten Mistakes to Avoid



CEOs, Presidents, and Fundraising

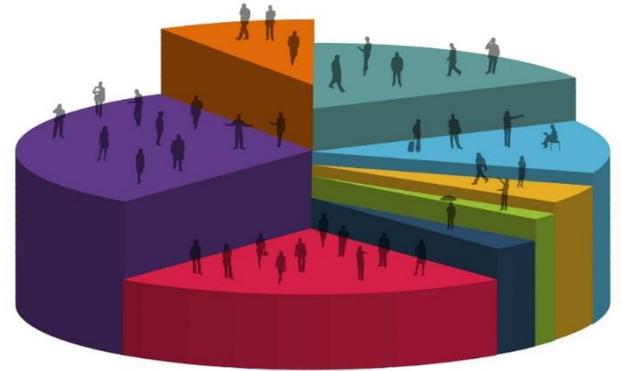
- Time spent on fundraising ranged from 10% to 45%
- 55% spent 20% or more of time on fundraising
- 25% specifically requested training in fundraising and regular updates on best practices



Source: The Chronicle of Higher Education: Special Report – What Presidents Think

CEOs, Presidents, and Fundraising

- 53% perform a fundraising activity daily
- 43% communicate daily with the Director of Development
- 18% unprepared for fundraising
- Major concern and key definition of success – meeting fundraising goals
- Greatest challenge – fundraising



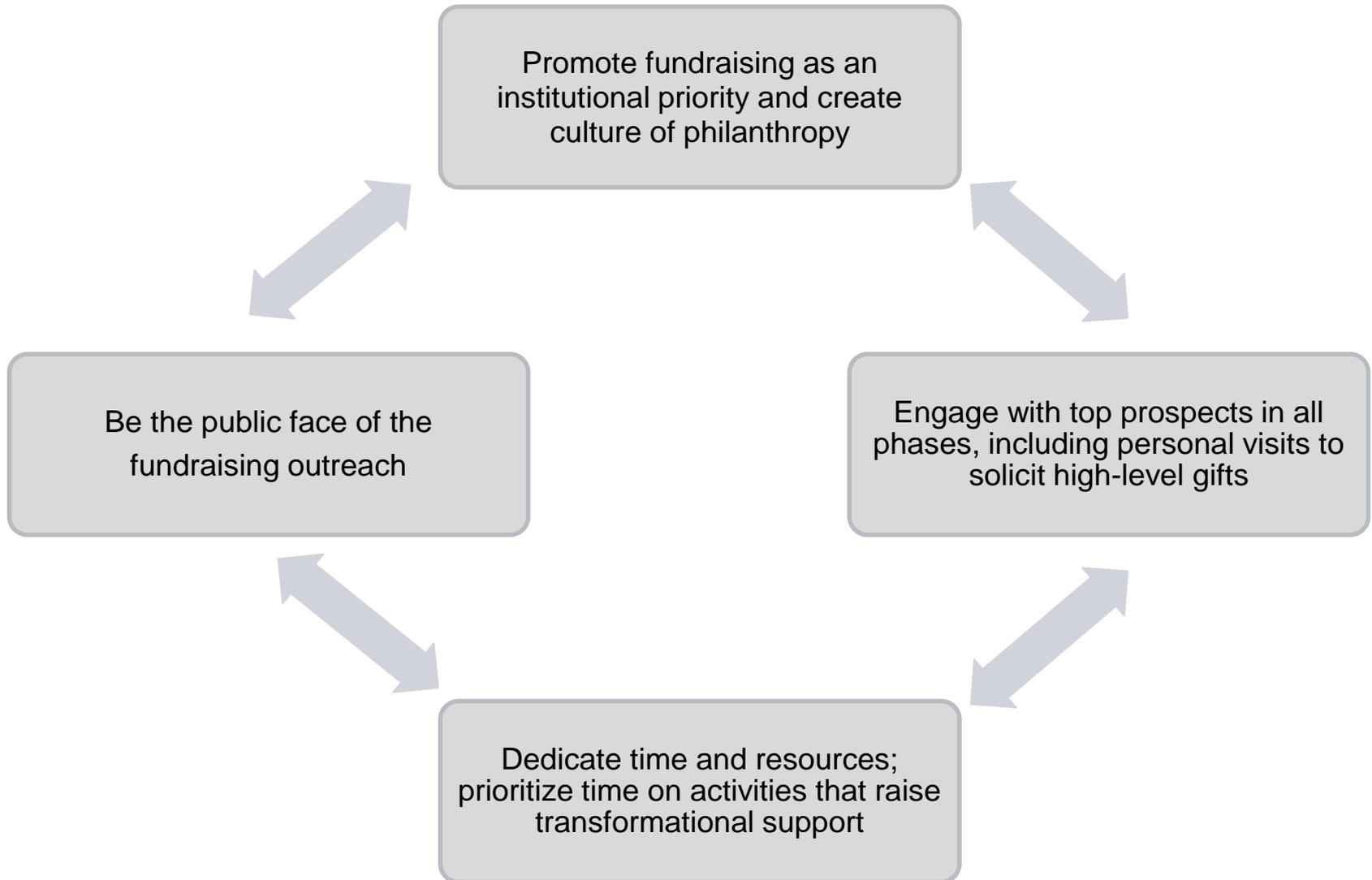
Poll

How many solicitations does your CEO conduct each month?

- A. More than 2
- B. More than 4
- C. More than 7



President's Role in Fundraising



Feedback from Institutional Leaders

- What do you expect from your Development Team when it comes to managing up to the President?
- What are your biggest pet peeves?
- What is your own role in fundraising?
- How should the Development Team collaborate with top Board members?
- How do you want your Development Team to communicate with your top donors?



Actual Feedback from College President

What do you expect from your Development Team when it comes to managing up to the President?

- A partner: someone who is strategic; knows the institution; and is not isolated.

What are your biggest pet peeves?

- Not having the right data/information; apathy

What is your own role in fundraising?

- Closer on BIG gifts; entertain strangers; articulate vision

How should the Development Team collaborate with top Board members?

- Carefully; share data on how money spent to show impact and connect to the organization

How do you want your Development Team to communicate with your top donors?

- Burden on the President to set the tone and show confidence in staff to connect donors to the organization through the impact of their support

Board Responsibilities

- Develop policies
- Approve plans and procedures
- Give at the highest levels and accept a volunteer leadership role
- Identify, evaluate, introduce, cultivate, solicit, and steward prospects and donors
- Stimulate interest in prospective supporters



Expectations of Board Members

- Engage Board members
- Value their time and input
- Assign specific tasks
- Set definable annual goals for committees
- Attendance at meetings and key events
- Committee service
- Financial support

Board members are the primary stewards of the nonprofit organization, ultimately responsible for securing adequate resources and overseeing the disposition of those resources. Thus, a commitment to fundraising must begin with the board.

Actual Feedback from a Board Member

What do you expect from your Development Team when it comes to managing up to the President?

- Concise and thoughtful materials; ensure there are no surprises; build up the CEO's confidence

What are your biggest pet peeves?

- Unprepared solicitations; unrealistic gift requests; when Development staff is not mindful of how busy the Board member is

What is your own role in fundraising?

- Give and get; tell the story of the institution; stimulate interest in the non-profit

How should the Development Team collaborate with top Board members?

- Lead, support, and encourage Board members; be mindful of Board's time constraints

How do you want your Development Team to communicate with your top donors?

- Keep donors informed to maintain investment – explain the impact of a donor's investment; tell a compelling story about the organization; can never over-thank donors

Poll

Are you involved with the CEO solicitations?

- A. Yes.
- B. No.



Common Issues and Challenges

A. Great Expectations

When funding needs or aspirations do not sync with fundraising capabilities.

B. Other People's Money

Reliance on other people not connected (or engaged) to the organization to give or to lead.

C. Trading Places

Misunderstanding of roles and expectations of leaders and leadership.

D. Square Peg, Round Hole

What worked elsewhere will not necessarily work for your current institution.

Common Issues and Challenges

E. Rush To Judgment

Unnecessarily rushing to decisions on goals, strategies, and public announcements.

G. Financial Planning (lack of)

Investing below the resources necessary in staff and budgeting required for success.

I. Mass Appeal

Overestimating the potential and misdirecting resources for grassroots and internet fundraising techniques.

J. Mixed Messages

(Mis)understanding what motivates donors and ignites their passions.

Feedback from CDO

What do you expect from your Development Team when it comes to managing up to the President?

- Team centered approach

What are your biggest pet peeves?

- Differing levels of staff commitment; staff turnover

What is your own role in fundraising?

- Articulate the vision; ask for the gift; steward gifts; offer operational staff leadership

How should the Development Team collaborate with top Board members?

- Every Board member is different and needs special attention because of their deep time and financial investments

How do you want your Development Team to communicate with your top donors?

- Carefully and frequently. Ensure that all communication tools are being used to inform and encourage future support

Thank You!

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