

Helping chief development officers build strong working relationships in the C-suite

Unlocking executive suite engagement

A chief development officer shared this story: She had been leading the fundraising arm of a major hospital for a few months. Although she was highly motivated to be a partner in the organization's leadership, she didn't feel that her contribution was always welcome. She wasn't regularly included in key strategy meetings with other executives, and even when she was, it didn't seem that they saw philanthropy as having a key role in helping their institution reach its goals. "I was rarely asked for my perspective—leadership

didn't seem to think I understood how the organization worked, what its priorities were or the challenges we faced," she recalls.

But a turning point came after she invited the system's chief medical officer to join her when she met with donors to discuss a significant philanthropic opportunity. The two executives hadn't spent significant time together before this. "Later I discovered that our chief medical officer's previous experience with development had been limited to being asked for donations," the chief development officer says.



The chief development officer briefed the chief medical officer to let him know what a valuable contributor he could be in this donor meeting. They discussed who the donors were—a couple who had made contributions to specific programs in the past and now were considering a major gift in honor of a relative who had received cancer treatment at the hospital. The chief development officer shared the donors' financial capacity and where development was in the stewardship relationship. She noted how the couple's interests aligned with the goals of the hospital and how the chief medical officer, a surgical oncologist, could fill in more details about the hospital's oncology programs.

The meeting went well; the donors were very attracted to the idea of supporting an initiative that was close to their hearts and also benefited the hospital and the community. They agreed to move forward to a proposal that would close the gift. And the chief medical officer, who had been reluctant to attend, left the meeting believing the development team could play a strategic role in their organization moving forward. As the chief development officer shared, "He actually called our chief executive officer and told him, 'Hey, she really does know what she's doing!'"

Game-changing teamwork

This story illustrates the value of a leadership team that works together



Chief development officer/chief executive officer study and methodology

The AHP/Advancement Resources study addressed this central question: What are the essential qualities of strong working relationships in the C-suite in health care philanthropy? We collected data related to several topics:

- How satisfied are chief development officers with their C-suite relationships?
- In the most satisfactory relationships, what are common practices?
- In the least satisfactory relationships, what are common practices?
- What strategies are used by chief development officers to improve their relationships with chief executive officers?
- What behaviors signify successful working relationships in the C-suite?
- What are the most common problems inhibiting C-suite working relationships?

We utilized AHP's broad member base to recruit volunteers from a variety of institutions (community hospitals, academic medical centers, children's hospitals, etc.) to participate and also interviewed a sampling of 10 chief executive officers. Based on the information derived from this qualitative phase of research, we designed and administered an extensive online survey of 30 questions that AHP sent to its base of chief development officer members. We used the responses of more than 150 participants to identify statistical inferences and patterns, and further analyzed the data to identify ideas and strategies that foster strong working relationships.

seamlessly for the benefit of its health care organization. When all of the C-suite executives—the term typically refers to the chief executive officer, chief operating officer, chief financial officer, chief information officer, chief medical officer and chief development officer—communicate effectively, pool their various talents, partner to develop strategic goals and collaborate to execute them, their teamwork can be game-changing.

But from our research and work, we have seen many chief development officers struggle to become integral members of the leadership team. Other executives sometimes see philanthropy as “just asking for money” and don't value its potential as a contributor to long-term vision and goals. What are some ways chief development officers can establish productive and satisfying relationships with their executive counterparts? And further, how can they encourage leadership to understand and embrace philanthropy's role in the overall success of their organizations?

To answer these questions, our firm, Advancement Resources, partnered with AHP in 2017 to conduct a comprehensive survey with chief development officers and chief executive officers from more than 100 health care organizations in the United States and Canada. What they shared provides insights into common challenges and successful strategies for engaging the executive suite in philanthropy. For more details about our study and its methodology, see the sidebar.

We've distilled a portion of this information into five keys to building strong working relationships with others on the

leadership team. These ideas primarily focus on the relationship between the chief development officer and chief executive officer but feature strategies that can be applied in other professional settings as well. We hope they help you as chief development officers and development professionals to assess your own practices and effectively focus on ways to enhance the role of philanthropy in your organization.

Philanthropy as an integral partner

The chief executive officer leads the business of the hospital; the chief development officer leads its culture of philanthropy. Ideally their roles are mutually respectful, interdependent and complementary. The importance

of open and clear communication, ongoing interest in each other's roles and challenges, and respect for each area's significant contribution to your organization's success are overall themes you will notice as we discuss the keys to building strong working relationships.

The first key: shared vision and operational knowledge

When the chief executive officer and executive team are convinced of the importance of philanthropy to your organization's mission and long-term goals, they will naturally seek to collaborate with the development team. How can you help leadership better understand philanthropy's role and potential?

One idea is to discuss the impact

of giving. Those not familiar with development often see donors' gifts in a limited way—as a bunch of small contributions or a few large donations targeted to a capital project. As they understand that some donors may be willing to give in significant ways over many years, and how these donors' interests can impact operations and align with areas of growth, they may be more likely to include philanthropy in long-term planning.

Strategies:

- Discuss expectations, vision and philanthropic strategy with your chief executive officer and executive team. Ask how they view the current culture of philanthropy at your institution and how they might see its role expanding to contribute to long-term goals.
- Discuss how the development

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team might partner with other executives as experts in relationship building, community advocacy and outreach.

- Involve your chief executive officer and other executives in meetings and donor situations as appropriate.

As a chief development officer, you also need to cultivate a good general knowledge of your organization's operations, plans and challenges. Discussing the various areas of the hospital with leadership helps you learn about potential opportunities for philanthropy and builds rapport.

In our survey, many chief development officers rated themselves as not knowing as much about other areas of their institutions as they need to in order to be seen as leaders. One strategy to develop this knowledge is simple: Ask! Set up meetings with executives and others, and, to begin, ask them what they think are the most important things you need to know. Ask what they would like to learn from you. Arrange for conversations with those who developed your hospital's strategic plan. And take advantage of research materials such as your hospital's publications, websites and press releases for background.

Strategy:

- Learn about other areas of your institution, as well as its future plans and challenges, through strategic conversations and research.

The second key: disciplined attention to communication

Chief executive officers and other members of the leadership team are likely to be skilled in negotiating, problem solving and navigating difficult conversations and disagreements in a civil



manner. You too should cultivate the ability to listen, adapt and express your perspective clearly and thoughtfully. If you feel that your own communications skills could be improved, seek resources such as leadership seminars or other types of training or coaching.

In addition to in-person meetings and one-on-ones, you will also need to keep your chief executive officer and other team members updated about activities surrounding philanthropy. Remember to tailor communication vehicles for the people with whom you are interacting. You might ask your chief executive officer how frequently she would like an update and in what format she prefers it. And always confirm expectations for turnaround times and following up on requests.

Strategies:

- Report to leadership regularly and track your conversations and the need for follow-up. This establishes your credibility and demonstrates respect, and is a tool for educating others about philanthropy.
- Make an effort to communicate in the way the chief executive officer and others desire, both in terms of style and communication vehicles.

The third key: professional confidence paired with personal humility

In our interviews, chief executive officers rated humility and

professionalism as the characteristics they most valued in their team members. But they also wanted other executives to feel confident about stating their opinions and contributing when their perspectives would be useful. As one chief executive officer said, “[My] best relationship has been with the chief development officer who feels comfortable asserting himself and making the best use of my time on behalf of the organization and on behalf of the development function.”

It's also important for chief development officers to realize that theirs is just one relationship the chief executive officer is cultivating, and that they must judiciously step back when appropriate. Especially early in your tenure as an executive, you may need to consider if what you propose is feasible or a top priority.

A few good check-in questions when you're considering whether to offer feedback are: Is this important information for the team to consider in making this decision? Is it helpful in determining what will be good for the organization as a whole? Is this information that someone needs, even if he may not want to hear it?

Strategies:

- Assert yourself as a leader who is not afraid to share opinions and tackle challenges.
- Realize that disagreements in the executive suite are not personal. Welcome challenges as an

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opportunity to put egos aside and problem solve together.

- Be open to learning from your fellow executives. Increasing your knowledge demonstrates humility and naturally increases confidence.

The fourth key: trust-based engagement

Honesty, trust and respect were named by both chief executive officers and chief development officers as the trademark triad of successful working relationships. Chief executive officers expressed that they value honesty the most highly—typical of the sentiments we heard was, “Even if you don’t particularly like me, I need you to be straight with me.”

As executives with many demands on their time and countless responsibilities to balance, chief executive officers have to make tough decisions and need the facts. Sometimes it can be tempting to omit details, especially those that might displease someone or reveal

information about an issue or subpar performance. But not sharing fully can damage relationships and cause unnecessary difficulty when problems come to light later on.

Keep in mind that chief executive officers may demonstrate trust and respect differently than development professionals typically do. For instance, our research indicated that chief executive officers are not likely to indicate that they lack knowledge about philanthropy or ask for help to learn more—perhaps because philanthropy is not always at the top of their list of priorities. Instead, chief executive officer behaviors that indicate trust and respect might include accepting feedback on fundraising topics, participating in donor meetings when asked and responding to informal phone calls.

Strategy:

- Be honest, even when it is uncomfortable. Establish your positions (with data to back them up, when appropriate) and then share them with confidence.

The fifth key: strategic relationship cultivation


According to chief development officers, it’s rare for chief executive officers to automatically recognize and value philanthropy. Many of them found it useful to think about building their C-suite relationships over time, just as they would when they engage donors. You wouldn’t expect a donor to feel comfortable enough to share intimate stories with you at a first meeting, so why would you think your executive relationships would thrive without some time and attention?

Fortunately, chief development officers tend to be interested in and skilled at cultivating relationships. As one participant said, “If you can get along with your donors, you can get along with your boss.”

Strategies:

- Engage with the chief executive officer’s vision, then share how you can harness the power of philanthropy to help achieve it.
- Recognize that it may take a long time to build a relationship with a chief executive officer and adjust your expectations as necessary.

Conclusion

Improving your relationships in the C-suite may involve time and effort. But having the engagement and support of your chief executive officer and colleagues is transformational as you build a culture of philanthropy and embrace your role as a valued member of the leadership team. 



Ben Golding is chief operating officer and co-owner of Advancement Resources, a leading nonprofit training firm for best practices in philanthropic engagement. He has trained professionals at over 100 national and international nonprofit institutions on donor-centric development practices.