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AND MASSACHUSETTS GENERAL HOSPITAL

Is Philanthropy the Elephant in Your office?

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November 1, 2011

A Few Questions to Get Us Started...

- ❧ Is philanthropy a “nice to have” or a “need to have”?
- ❧ Have your fundraising responsibilities as a CEO or an Executive Director increased, decreased or stayed the same in the last two years?
- ❧ Do you have a clear vision for your role in the philanthropic program?

The Model CEO or Executive Director

In a study by the Advisory Board Company, the model CEO was described as playing three key roles: providing the development office with information and resources; building a culture of philanthropy, and advancing donor relations

Providing Information and Resources

Empower the CDO and the development team to create and execute a successful philanthropy strategy

- ☞ Make CDO part of leadership team
- ☞ Include the CDO in strategic planning and give them a role in the Board nominating process
- ☞ Invite CDO to Board meetings
- ☞ Allocate adequate funding for development function
- ☞ Make time on your busy schedule to meet with the CDO and development chair

Building a Culture of Philanthropy

Mobilize employees and volunteers of the organization in support of development.

☞ Establish and enforce philanthropy as an organizational goal

- Provide regular development reports at important meetings
- Articulate what philanthropy funds
- Communicate the case for giving to all employees
- Recognize employees for their engagement

Continued...

Building a Culture of Philanthropy (cont'd)

- ☞ Act as role model, both as philanthropist and fundraiser
- ☞ Include philanthropy on institutional dashboard
- ☞ Tell the philanthropic story in publications and materials
- ☞ Set clear expectations and make the case for Board participation in philanthropy
 - Serve as ambassadors and advocates
 - Make annual and capital campaign capacity-level gift
 - Participate in the identification, cultivation, solicitation and stewardship of donors

Advancing Donor Relations

Personify the organization, make donors feel connected and confident that their support will be well stewarded

- Maximize visibility of your organization in the broader community
- Build partnerships with Board and other volunteer leaders
- Meet with donor and prospects
- Work with the development staff to align donor interests with institutional vision and priorities
- Be ready to communicate difficult news