



MIND THE GAP

**PERSPECTIVES ON THE PARTNERSHIP OF THE
COMMUNITY COLLEGE CEO AND CHIEF
DEVELOPMENT OFFICER**

John Lippincott, President, CASE

2012 CASE Conference for Community College
Advancement

Agenda

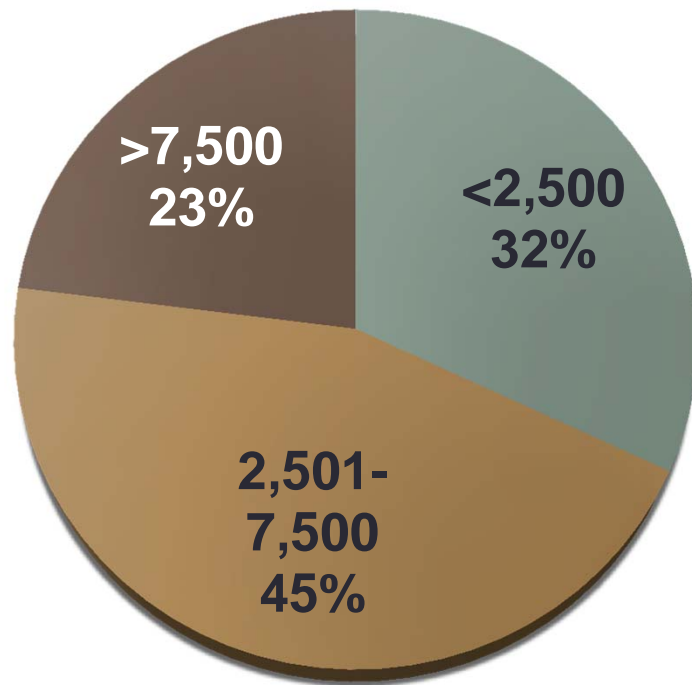
- About the surveys
- CEO/CDO relationship
- The CEO as fundraiser
- Goals and resources
- Boards and roles
- Success factors
- Closing perspectives

About the Surveys

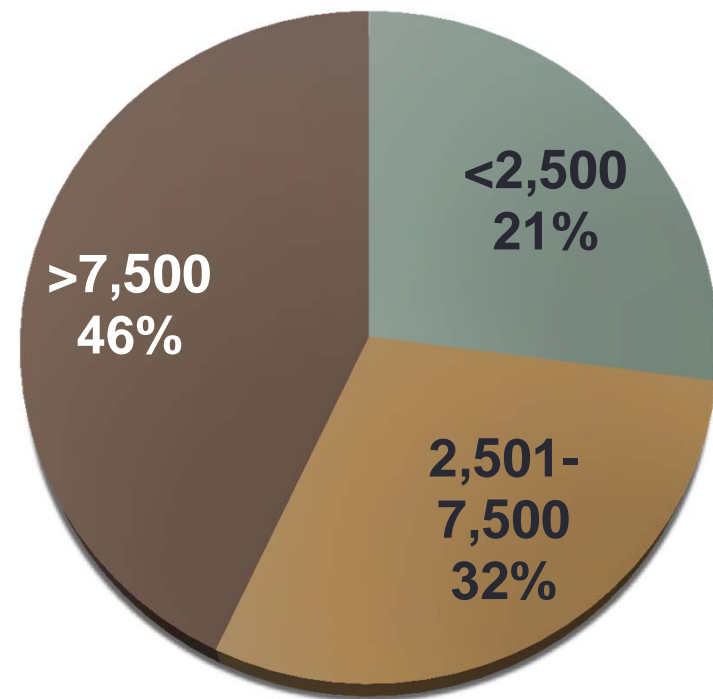
- Parallel surveys conducted in June 2012
- Responses from 70 CEOs, 137 CDOs
- Not necessarily from same colleges/districts
- Focus
 - Years in role
 - Years together
 - Fundraising success
 - Perceptions of effectiveness
- Percentages rounded

Enrollment

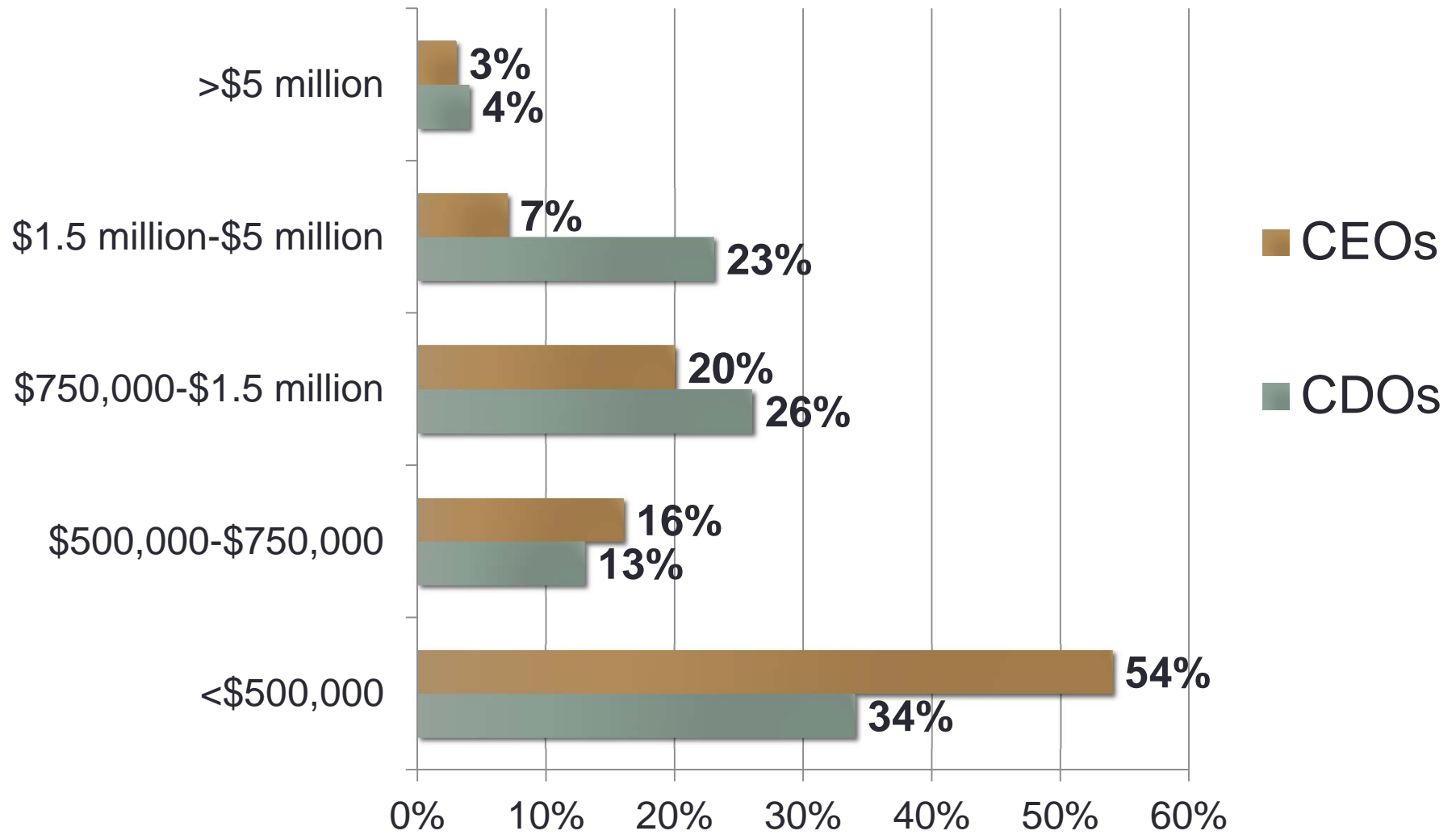
CEOs



CDOs



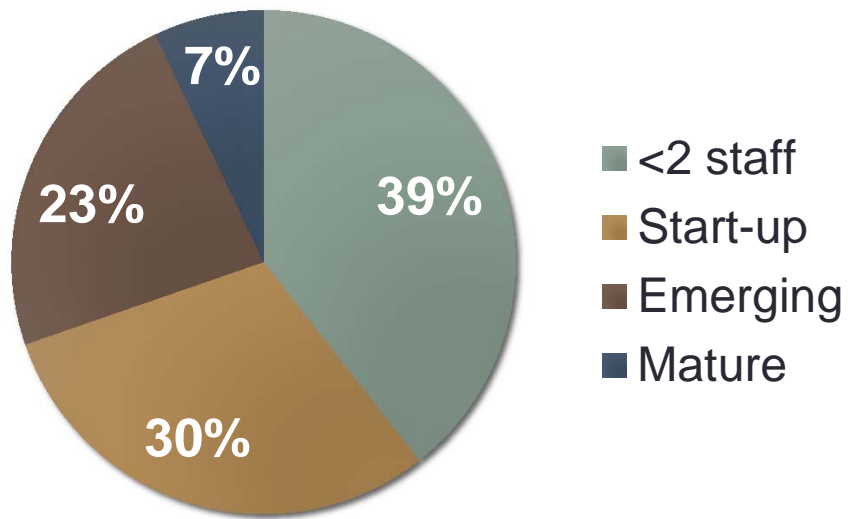
Private Support Raised*



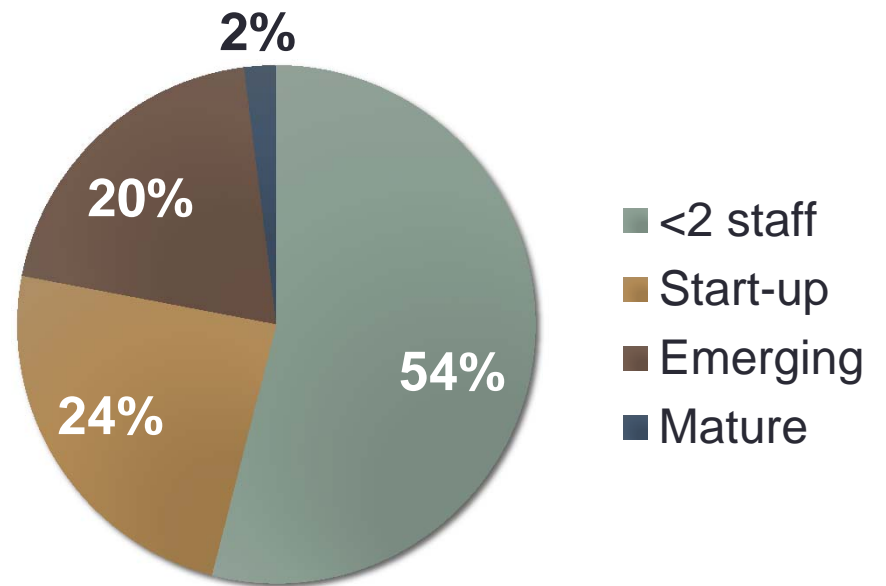
*most recent fiscal year

Fundraising Program Maturity

CEOs

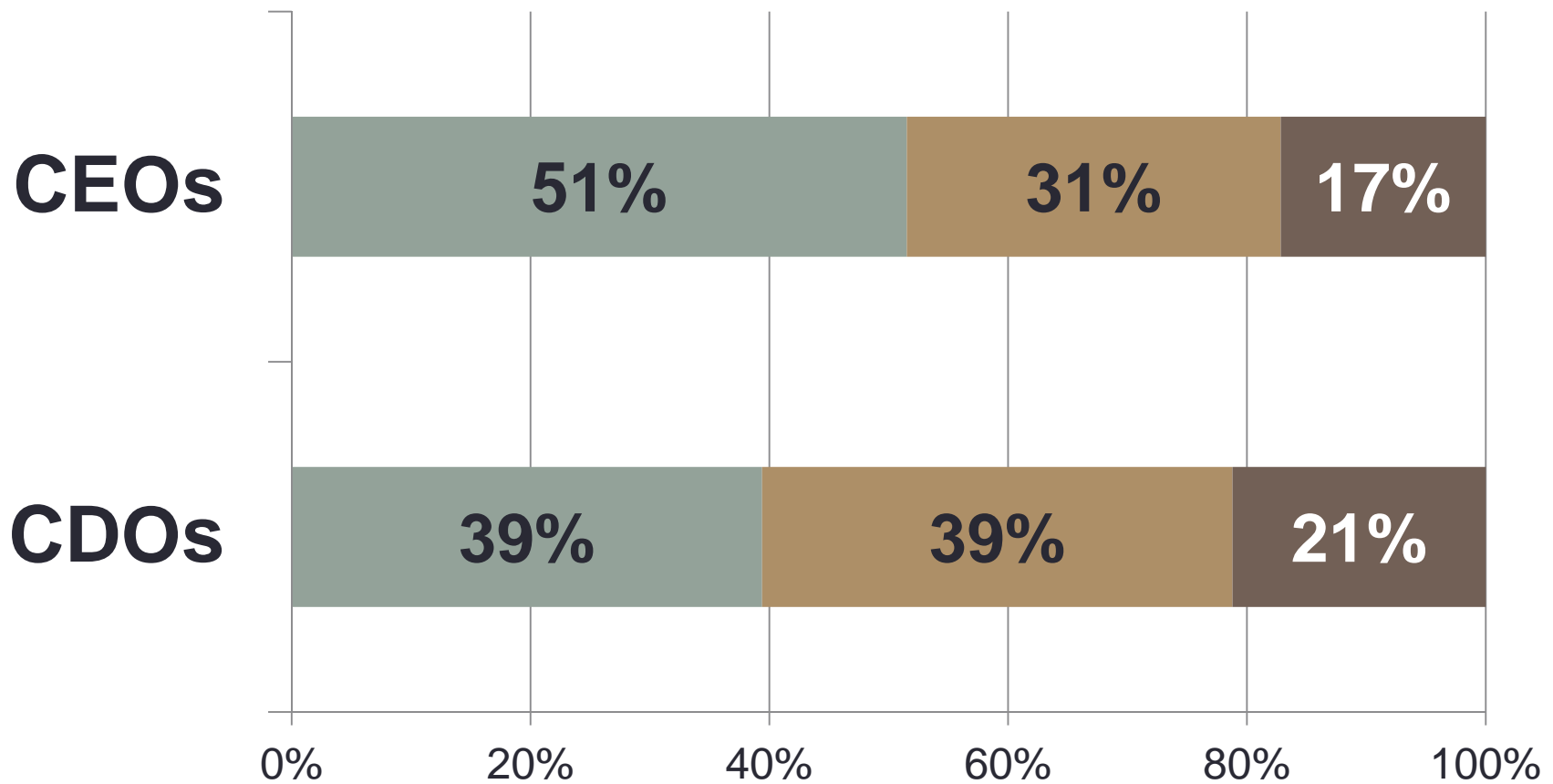


CDOs



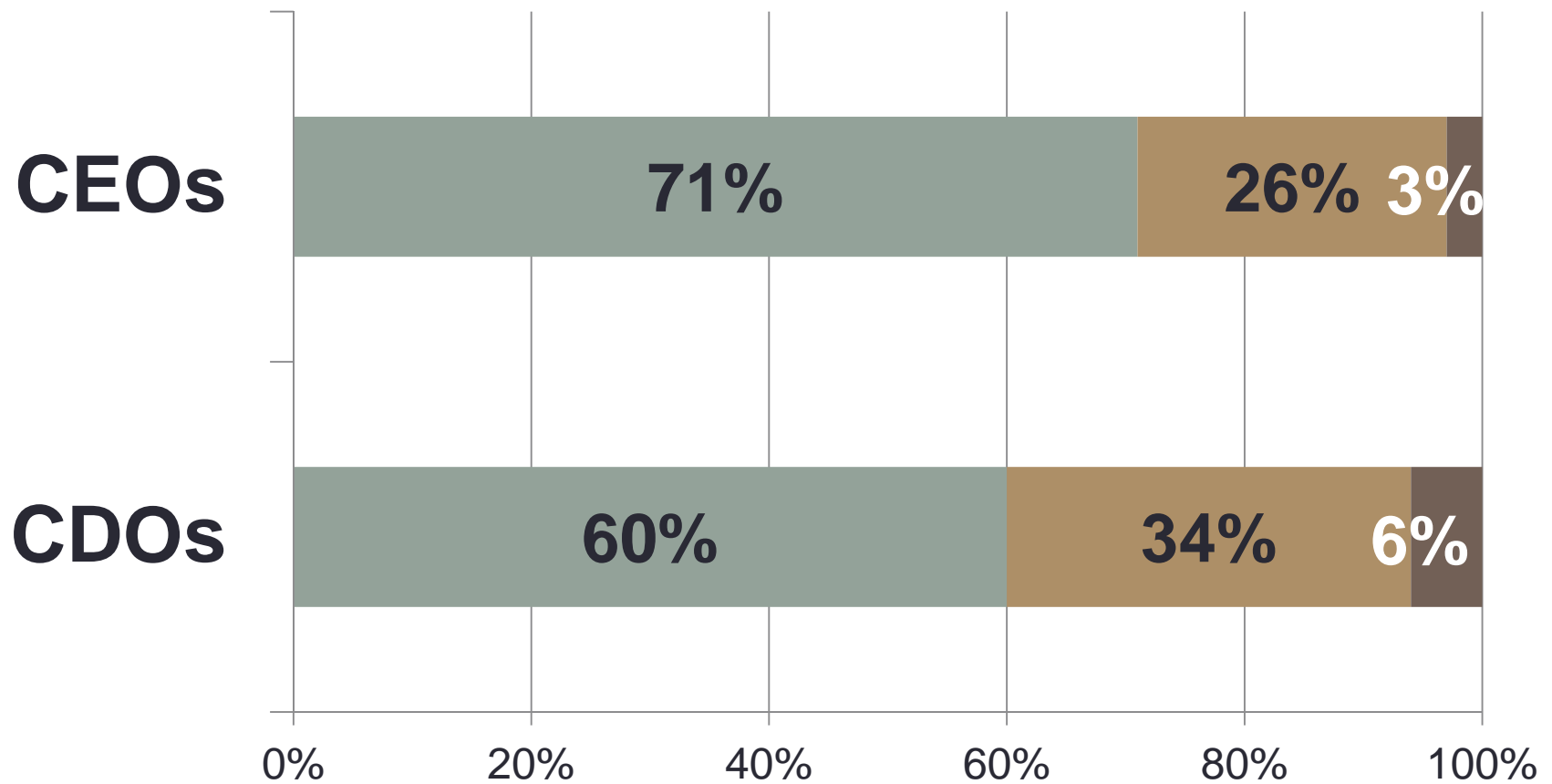
Years as CEO/CDO at Current Inst.

■ 1 to 3 yrs ■ 4 to 10 yrs ■ 11 + yrs



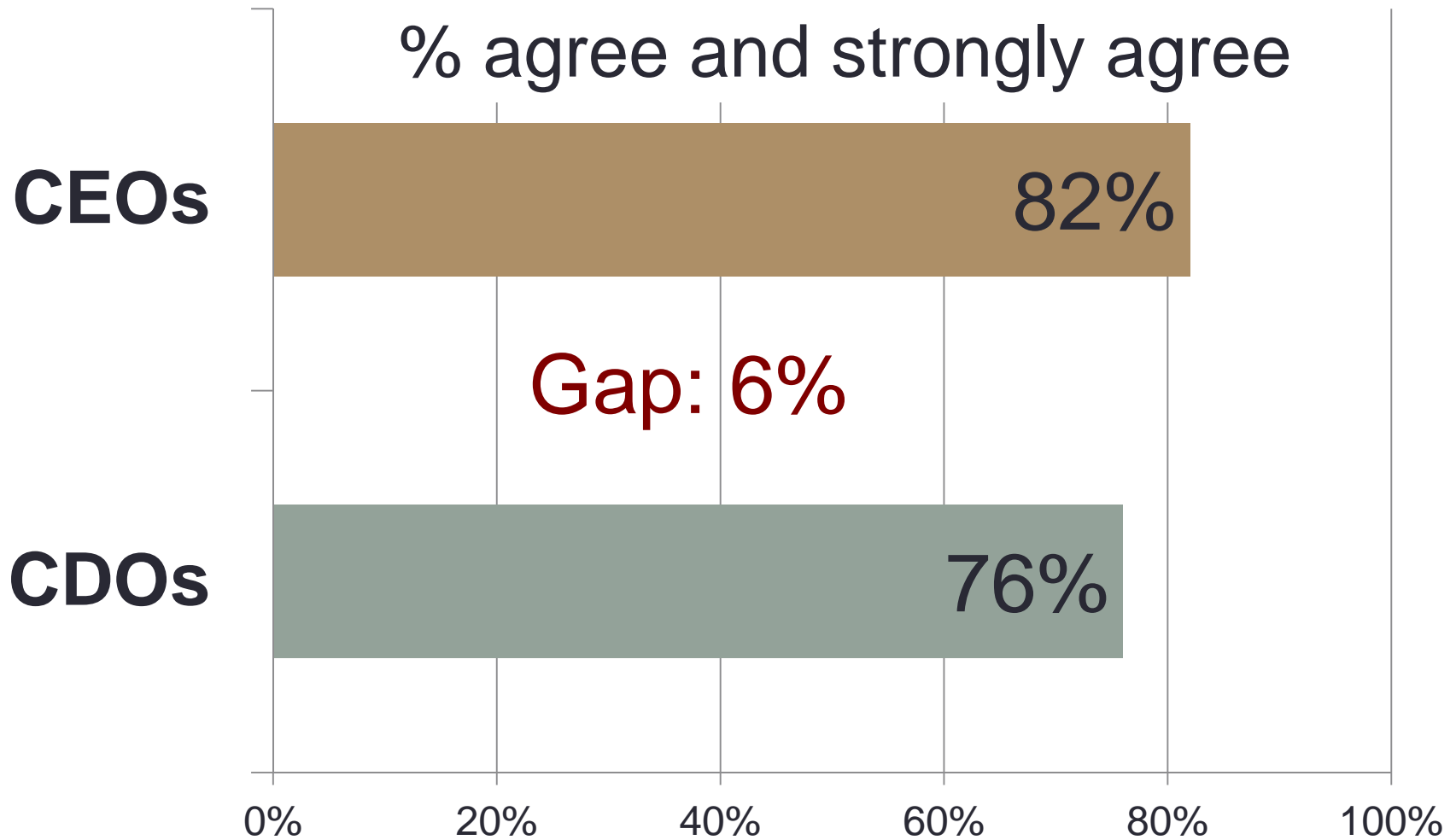
Years Working Together

■ 1 to 3 yrs ■ 4 to 10 yrs ■ 11 + yrs

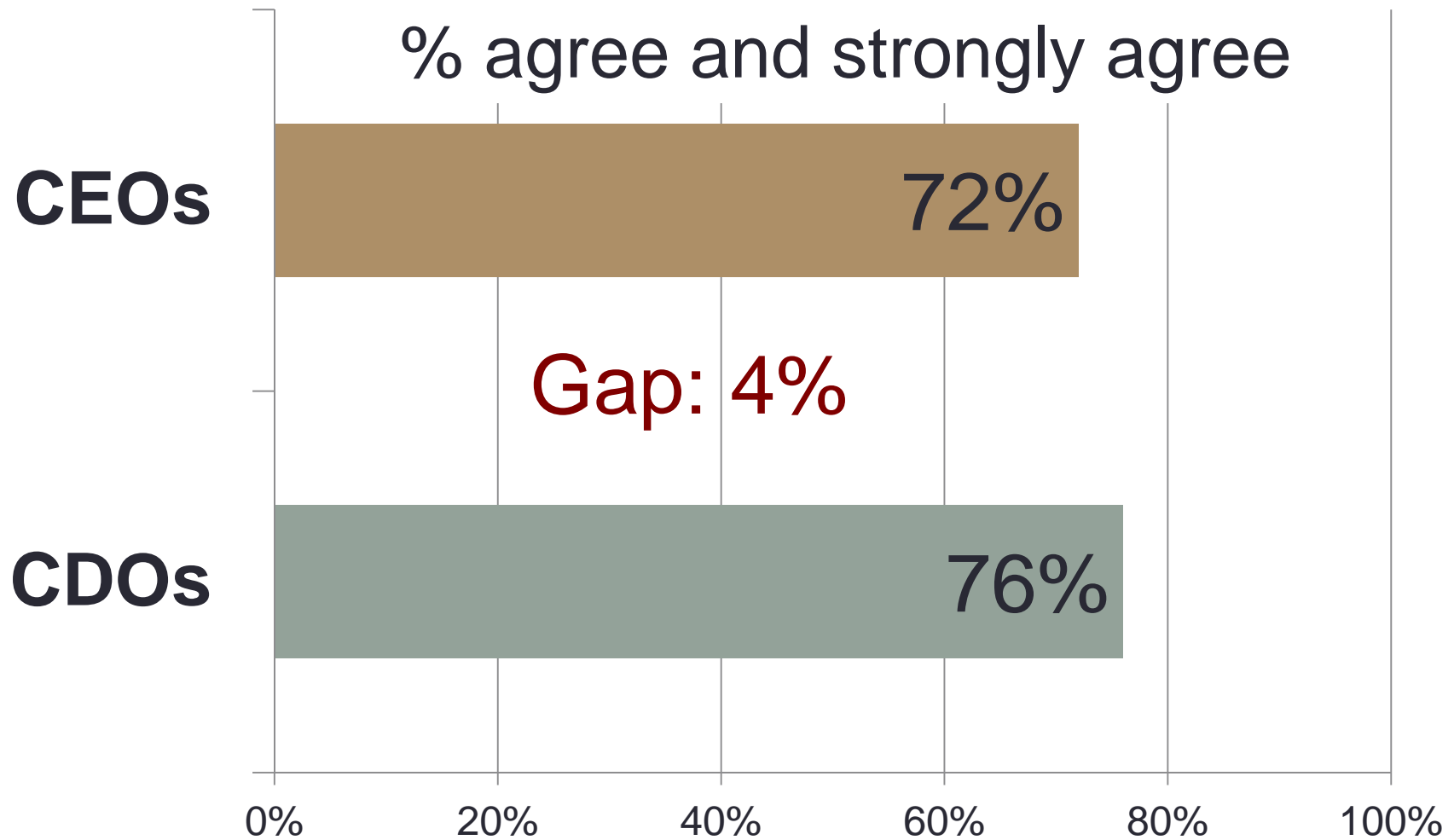


CEO/CDO RELATIONSHIP

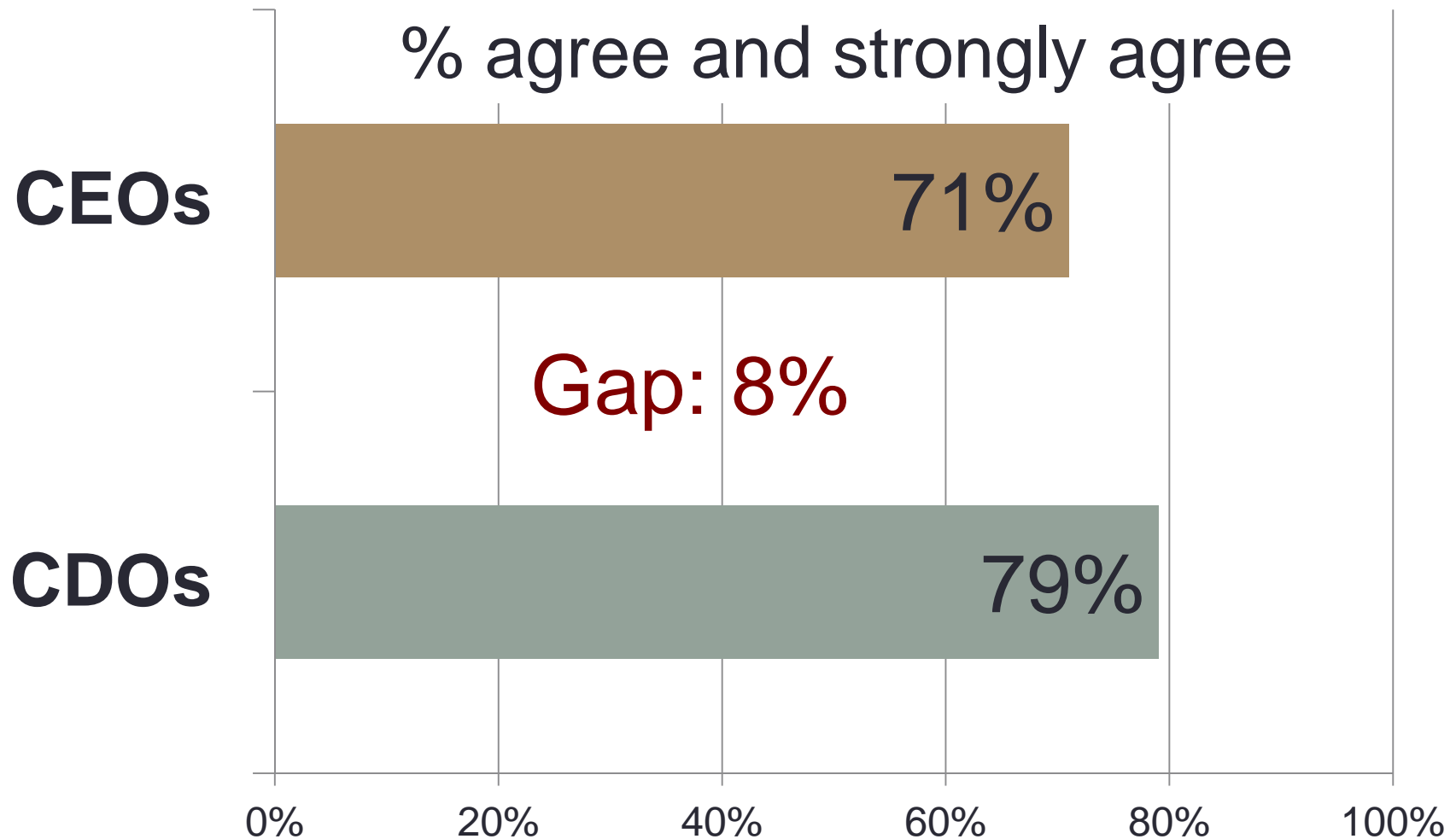
CEO/CDO Have Effective Relationship



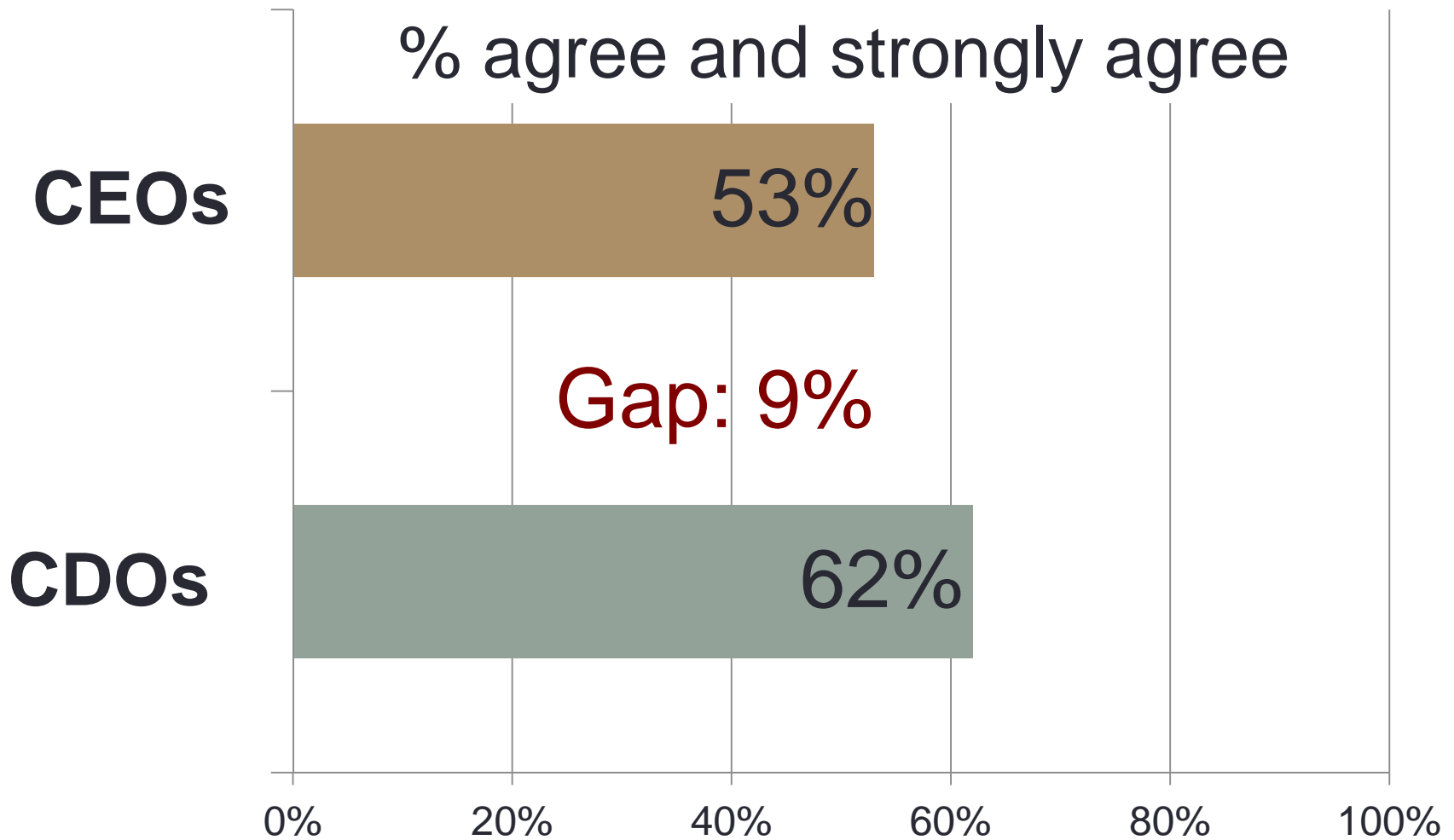
CDO uses CEO's Time Effectively



CDO Prepares CEO for Donor Meetings



CDO Helps CEO Improve in FR Role

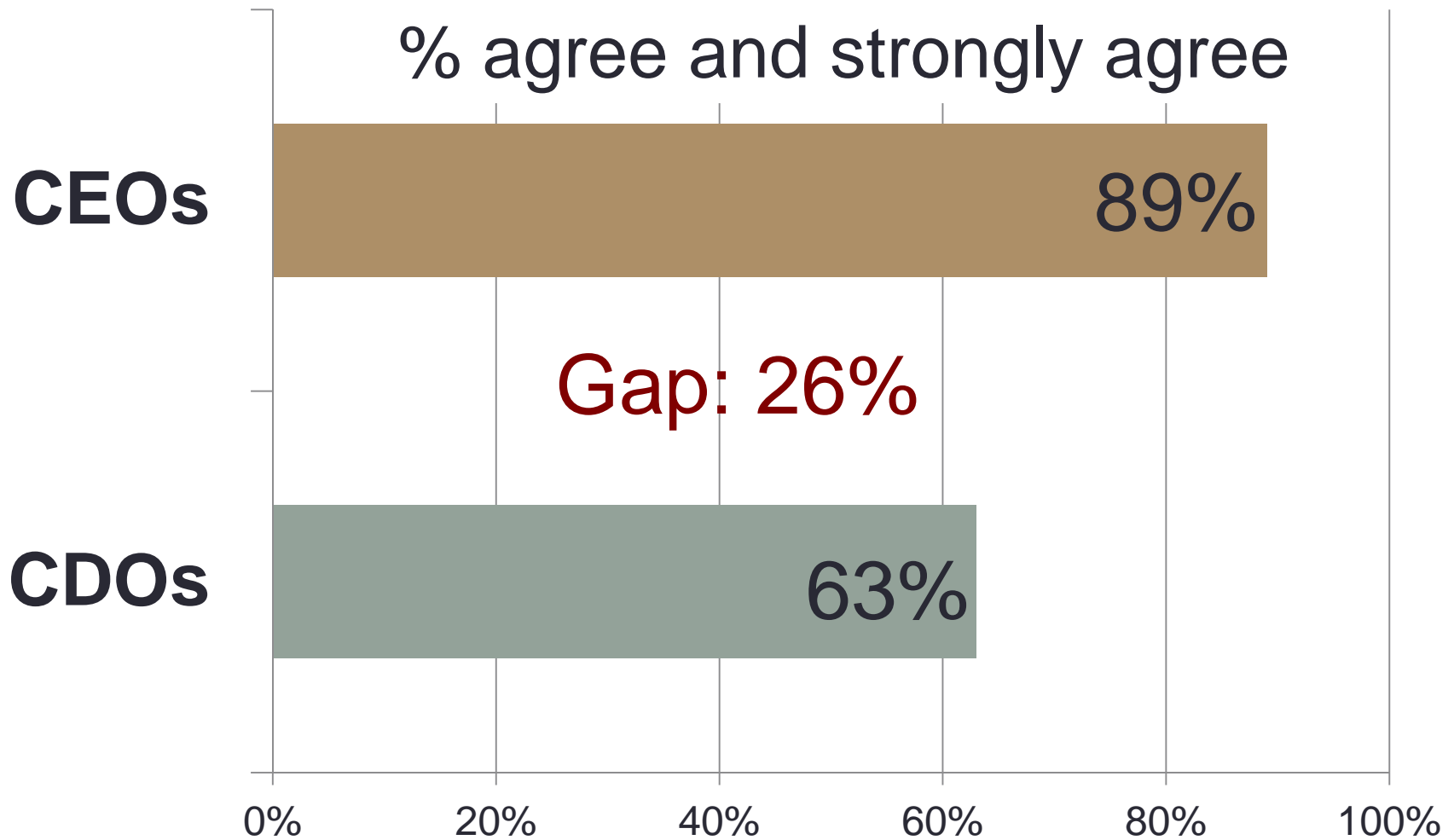


Frequency of Interaction

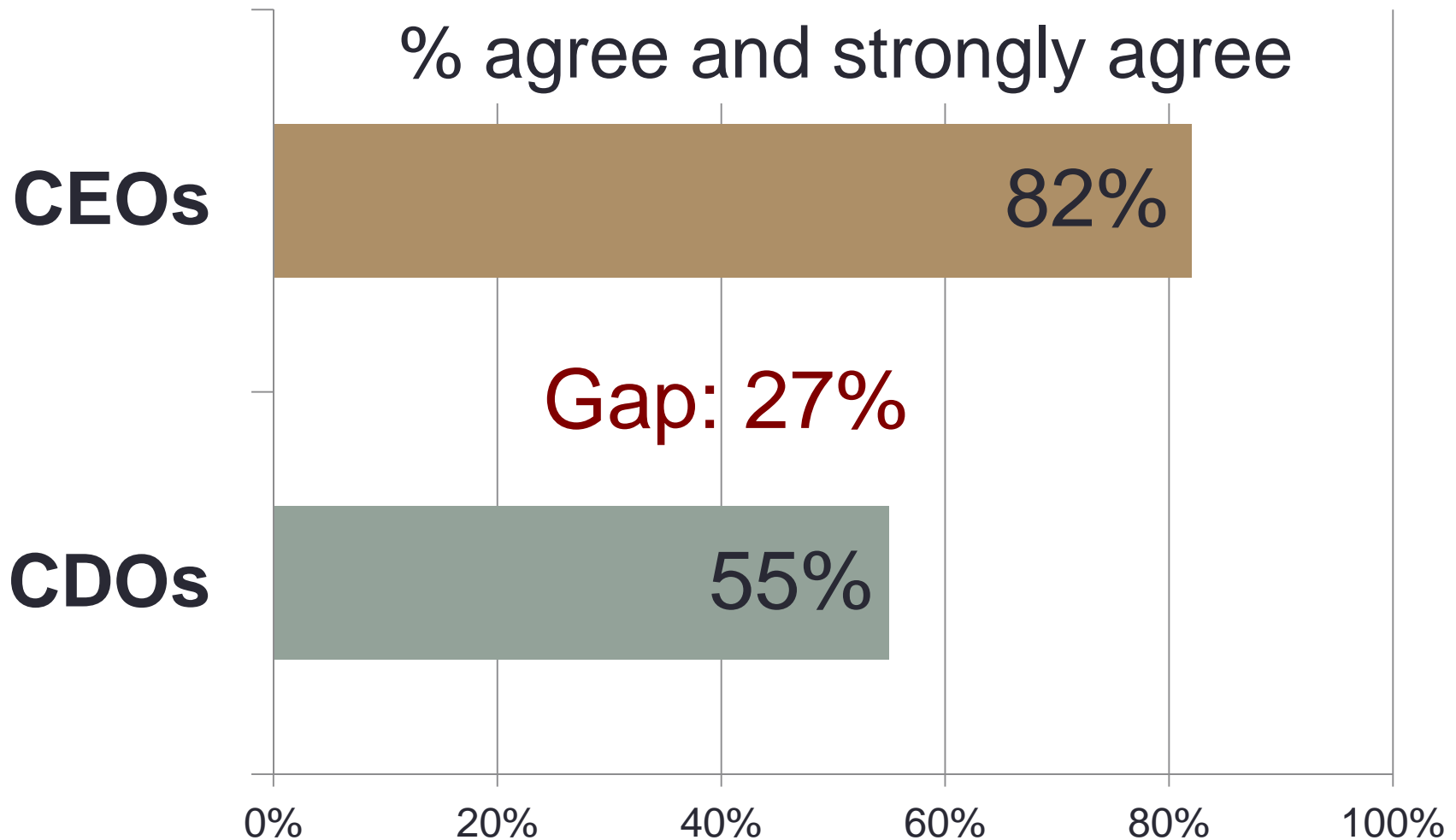
We interact on fundraising initiatives approximately ...	CEOs	CDOs	Gap
Several times a day	9%	7%	
About once a day	30%	15%	
At least once a day	39%	22%	17%
Once or twice a week	40%	39%	
Once or twice a month	17%	26%	
Less than once a month	4%	12%	

THE CEO AS FUNDRAISER

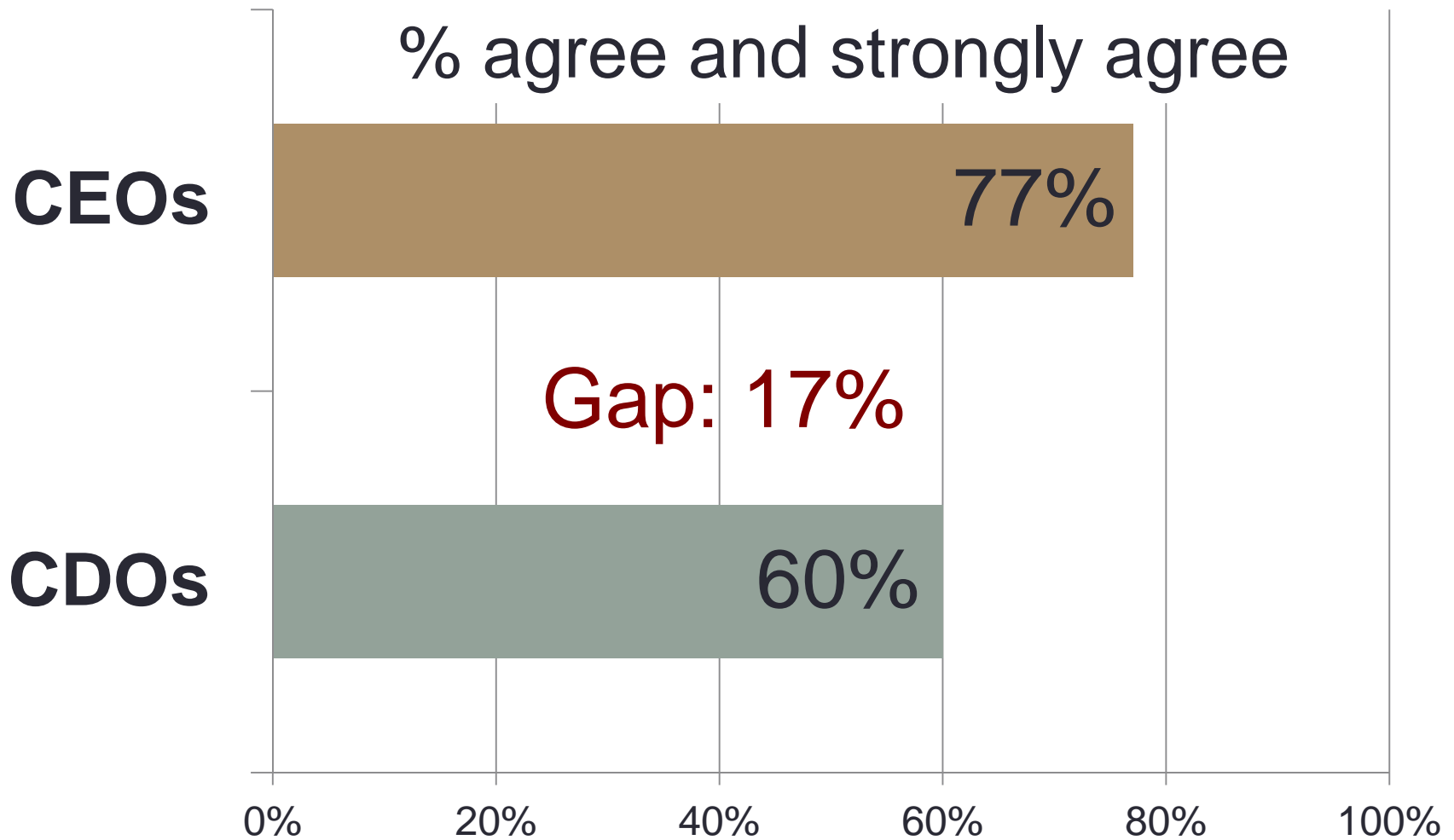
CEO Understands FR Process



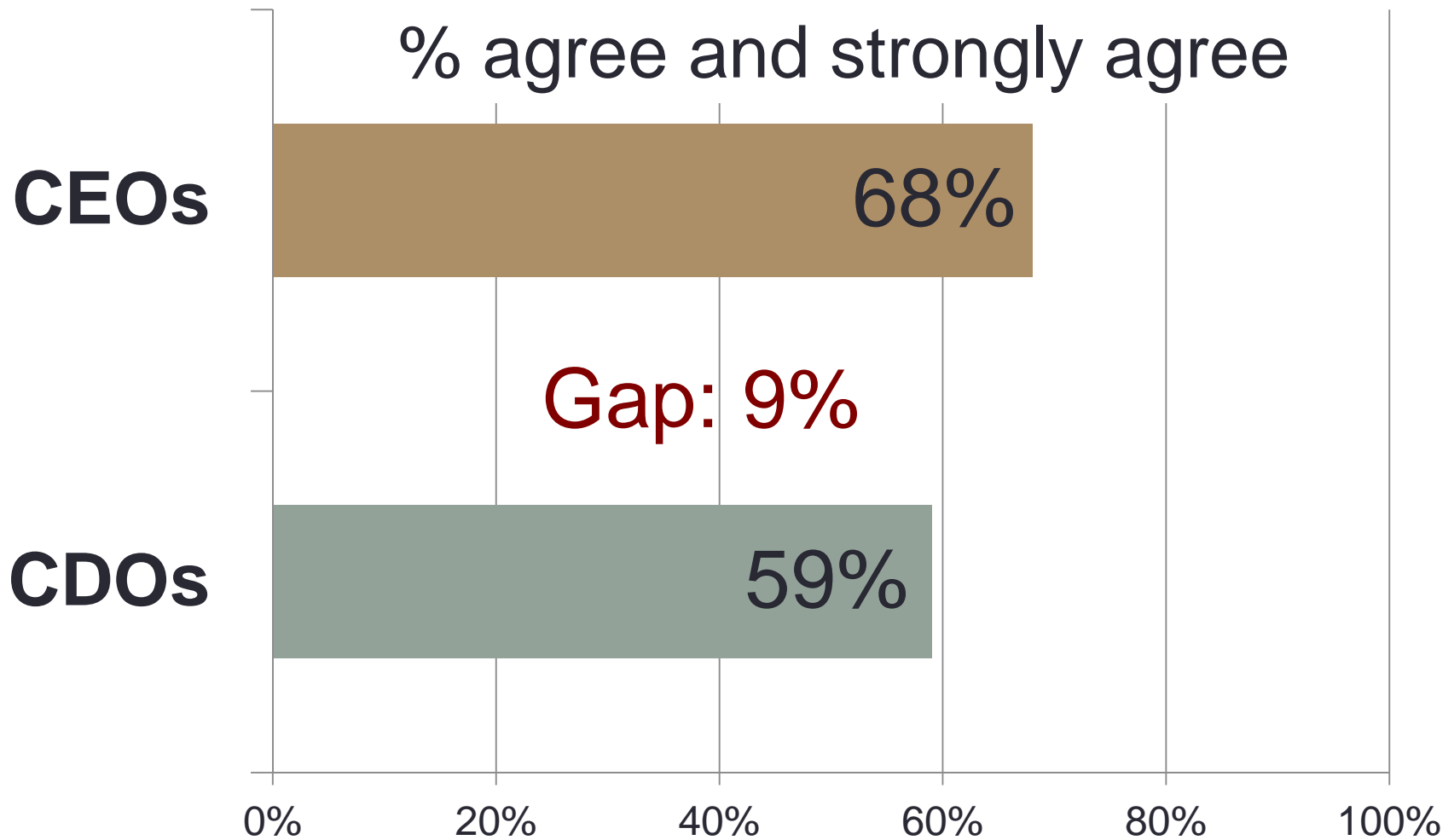
CEO Is Comfortable with Asking



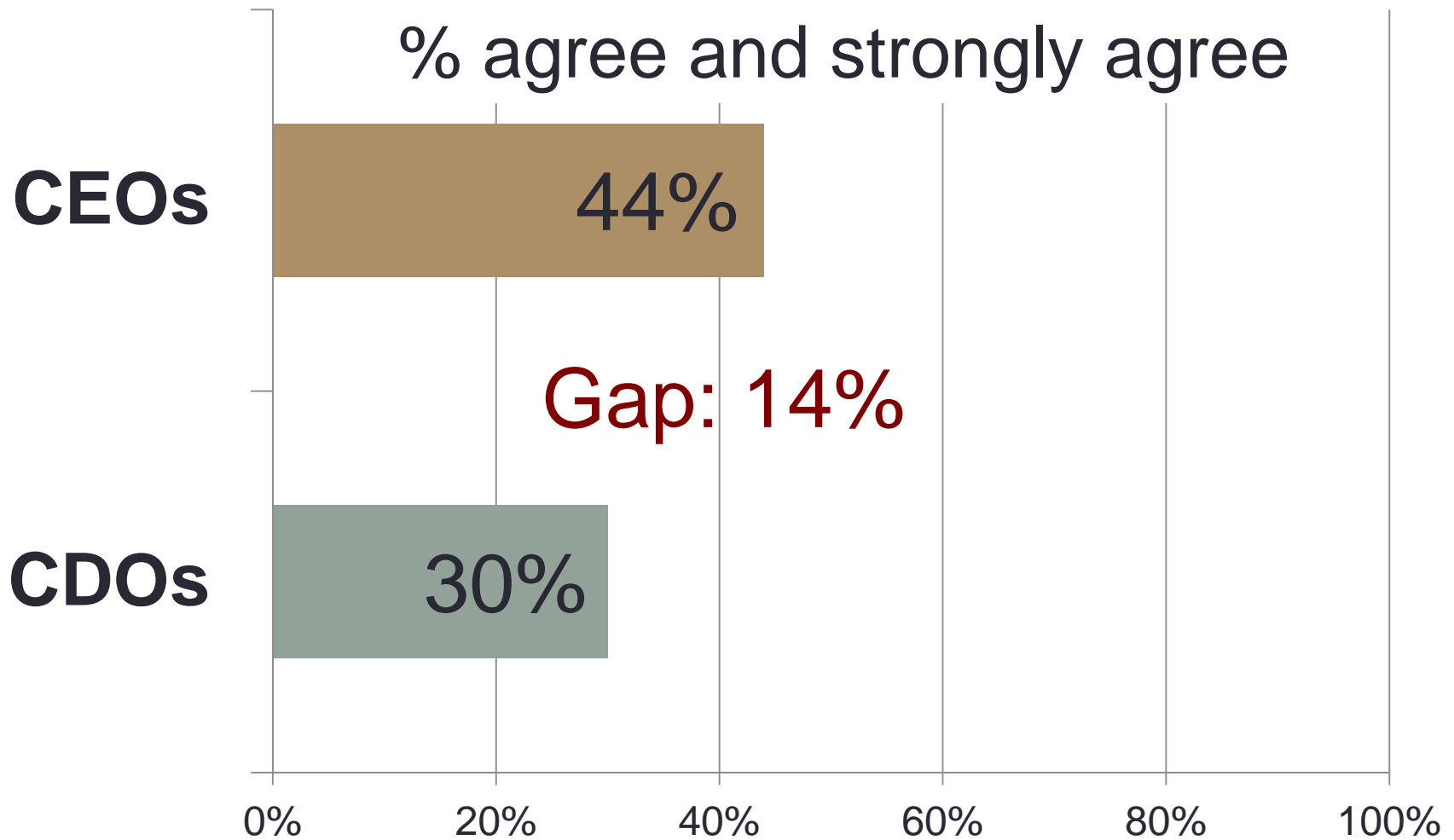
CEO Actively Cultivates Donors



CEO Actively Stewards Donors



CEO Spends Appropriate Time in FR

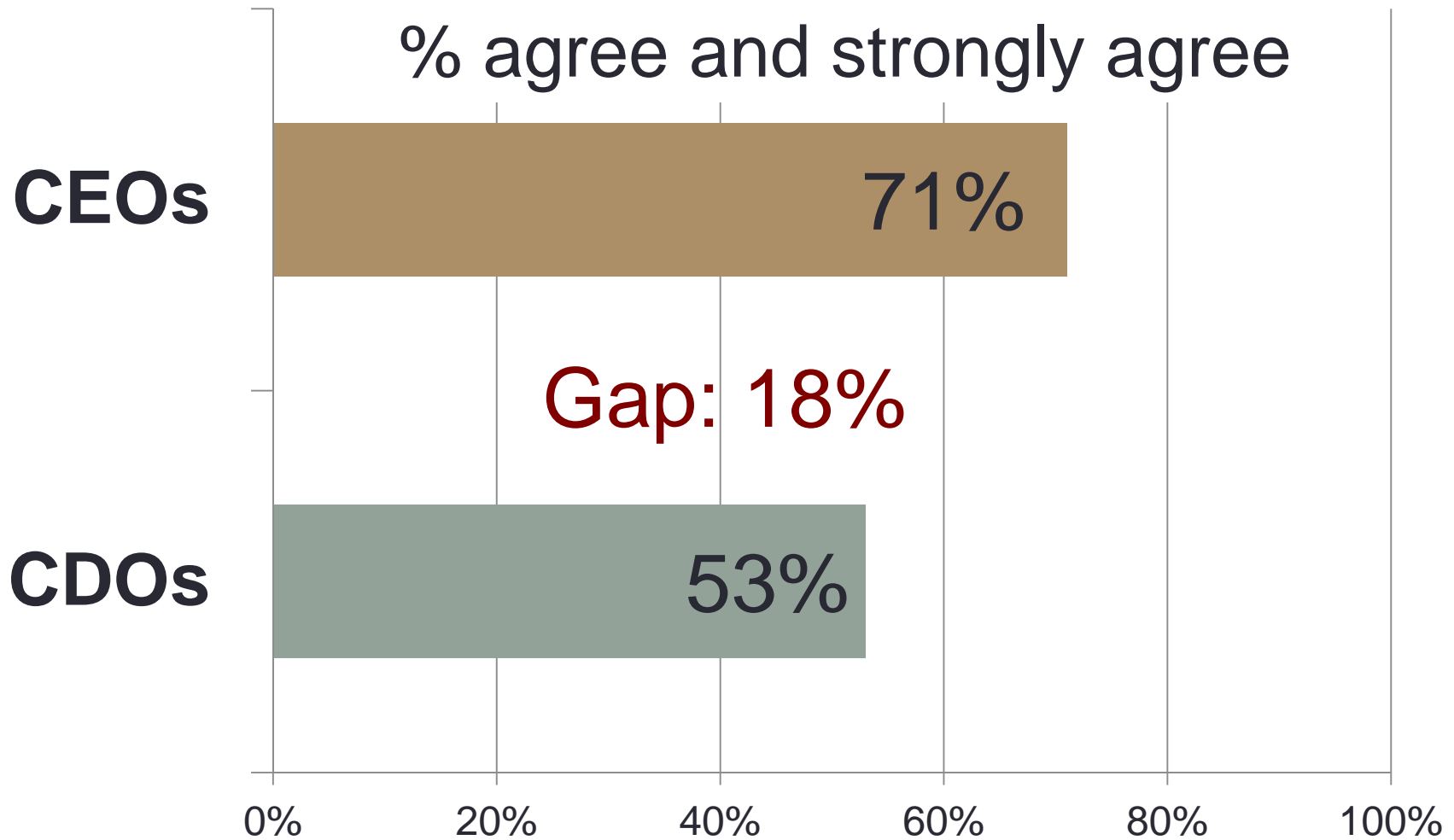


CEO Time Spent on Fundraising

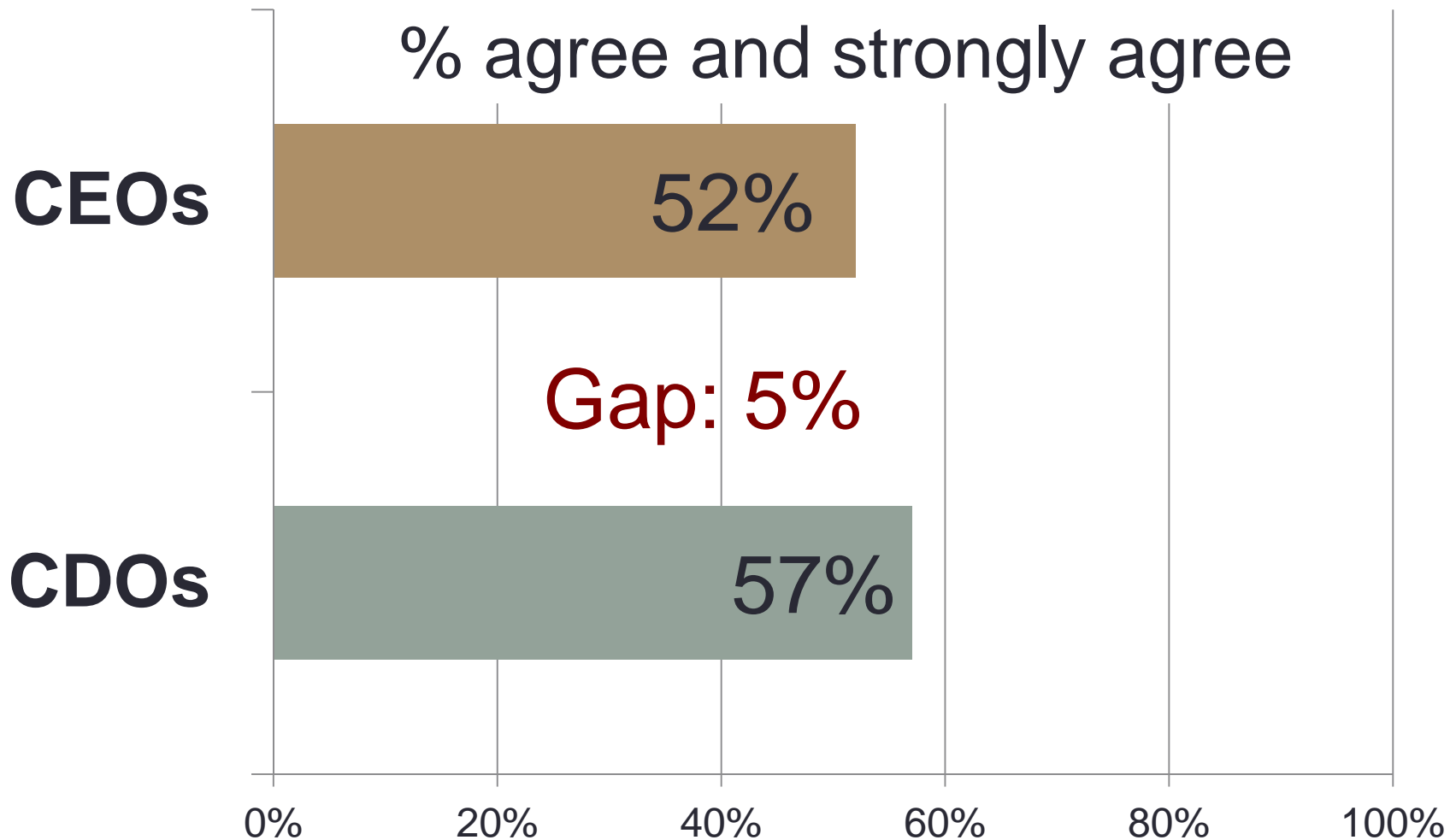
Amount of CEO's time spent on fundraising is approximately ...	CEOs	CDOs
50-74.9 percent	4%	5%
25-49.9 percent	17%	12%
10-24.9 percent	44%	34%
Less than 10 percent	34%	50%

GOALS AND RESOURCES

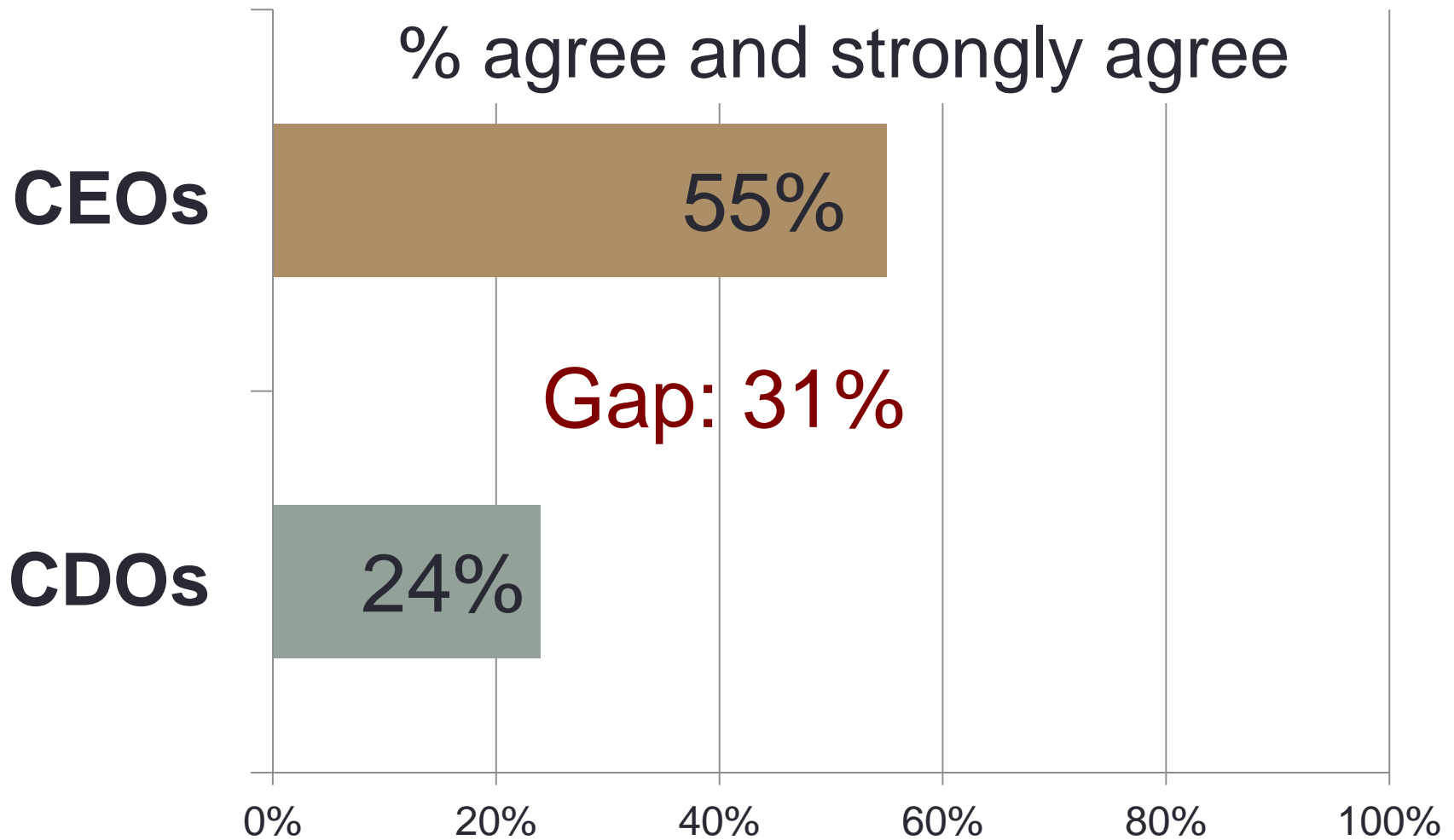
College/District Has Realistic FR Goals



FR Goals Support Aspirational Giving

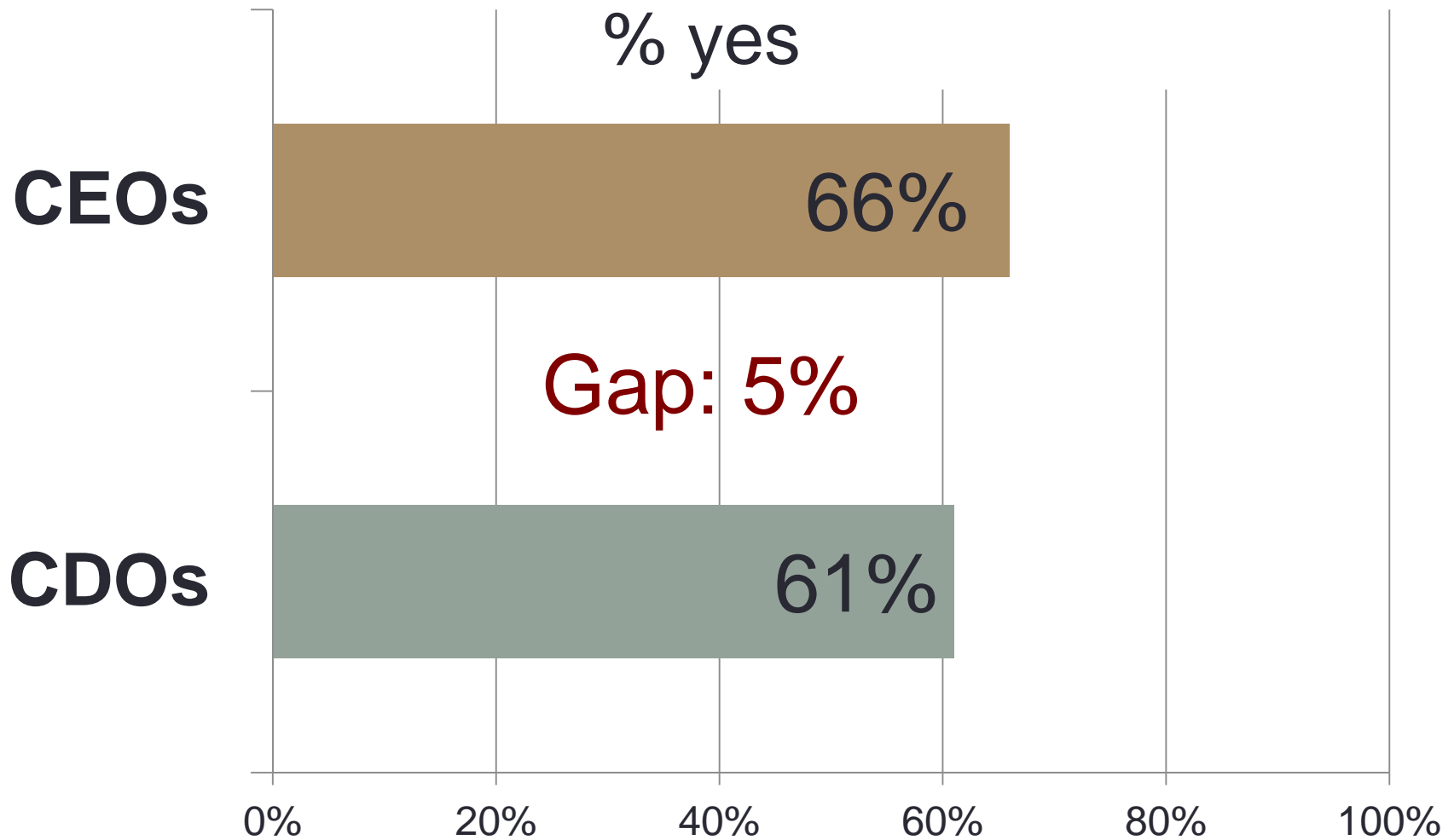


CDO Has Resources to Grow Giving

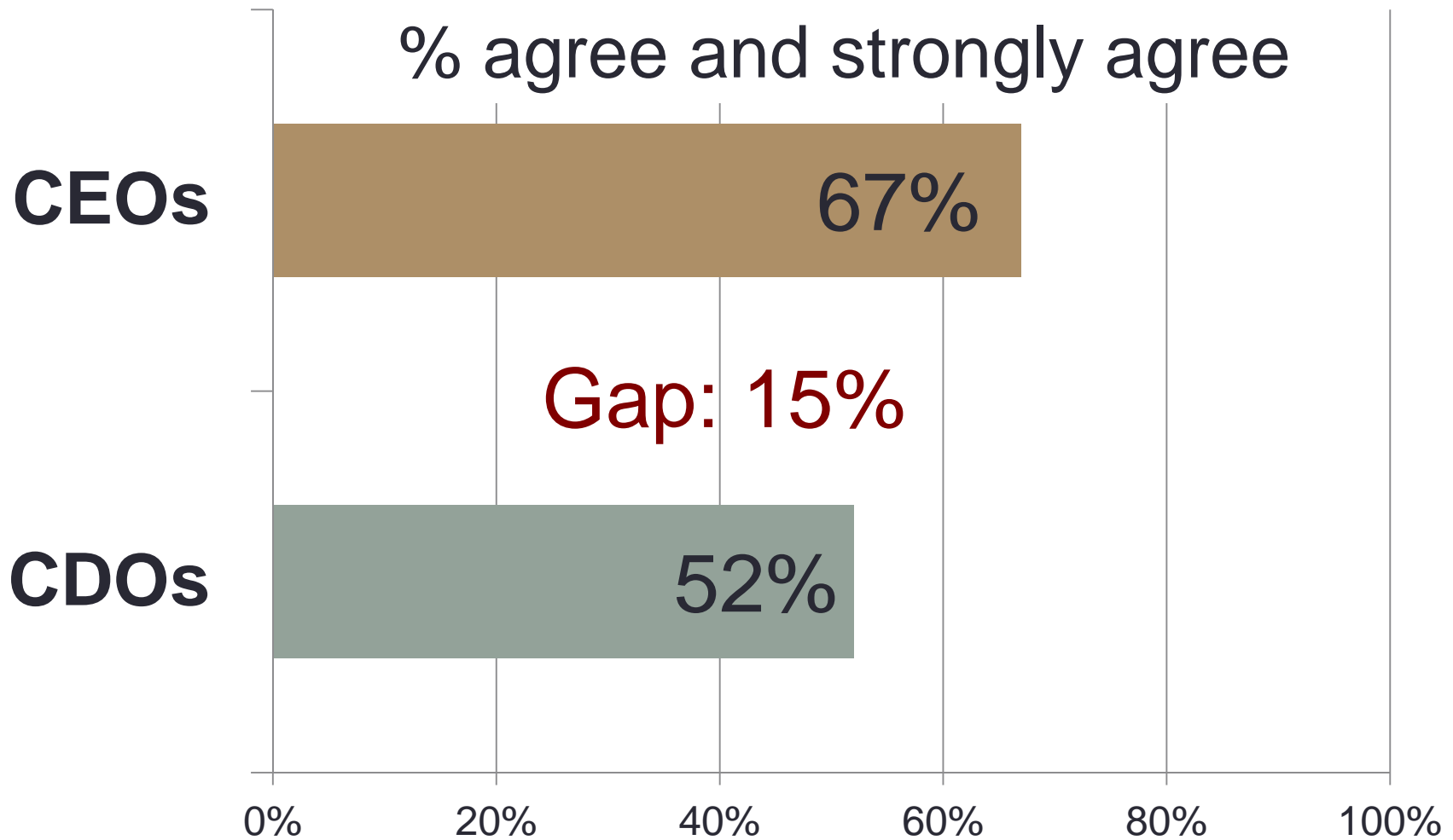


BOARDS AND ROLES

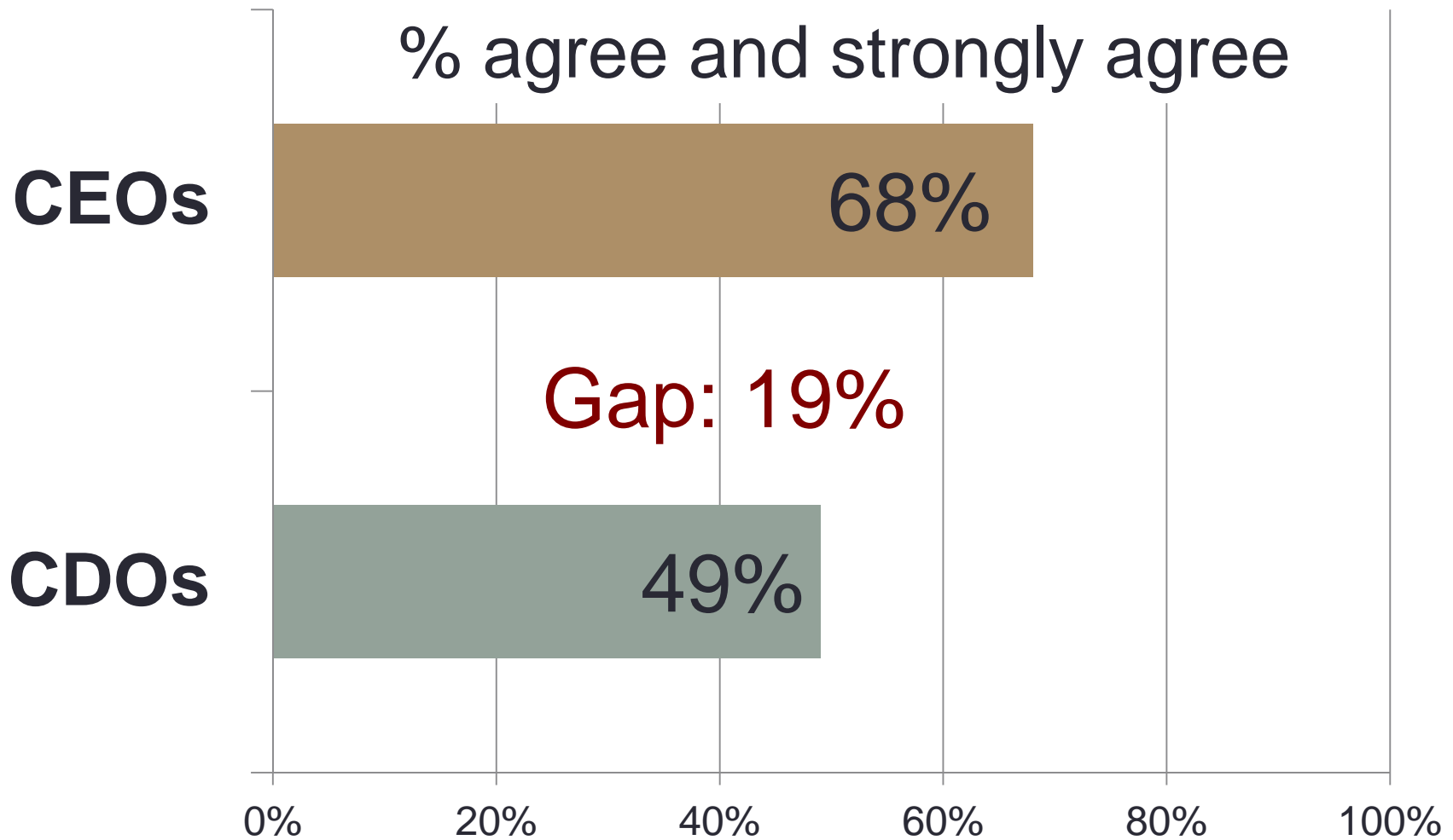
CDO Is on Senior Management Team



CEO Engages Foundation Board



Boards Have Shared Mission, Vision



CEO Perspectives

The CDO needs to “more fully engage the foundation board in campaign solicitations.”

The CDO needs to “break down the silo of the foundation office vs. presidential fundraising role.”

“We would benefit from a more combined effort between the foundation board and the alumni association.”

“Currently, I have to manage [setting up donor meetings] out of my office because the foundation views [itself] separately from the college.

CDO Perspectives

The CEO needs to ...

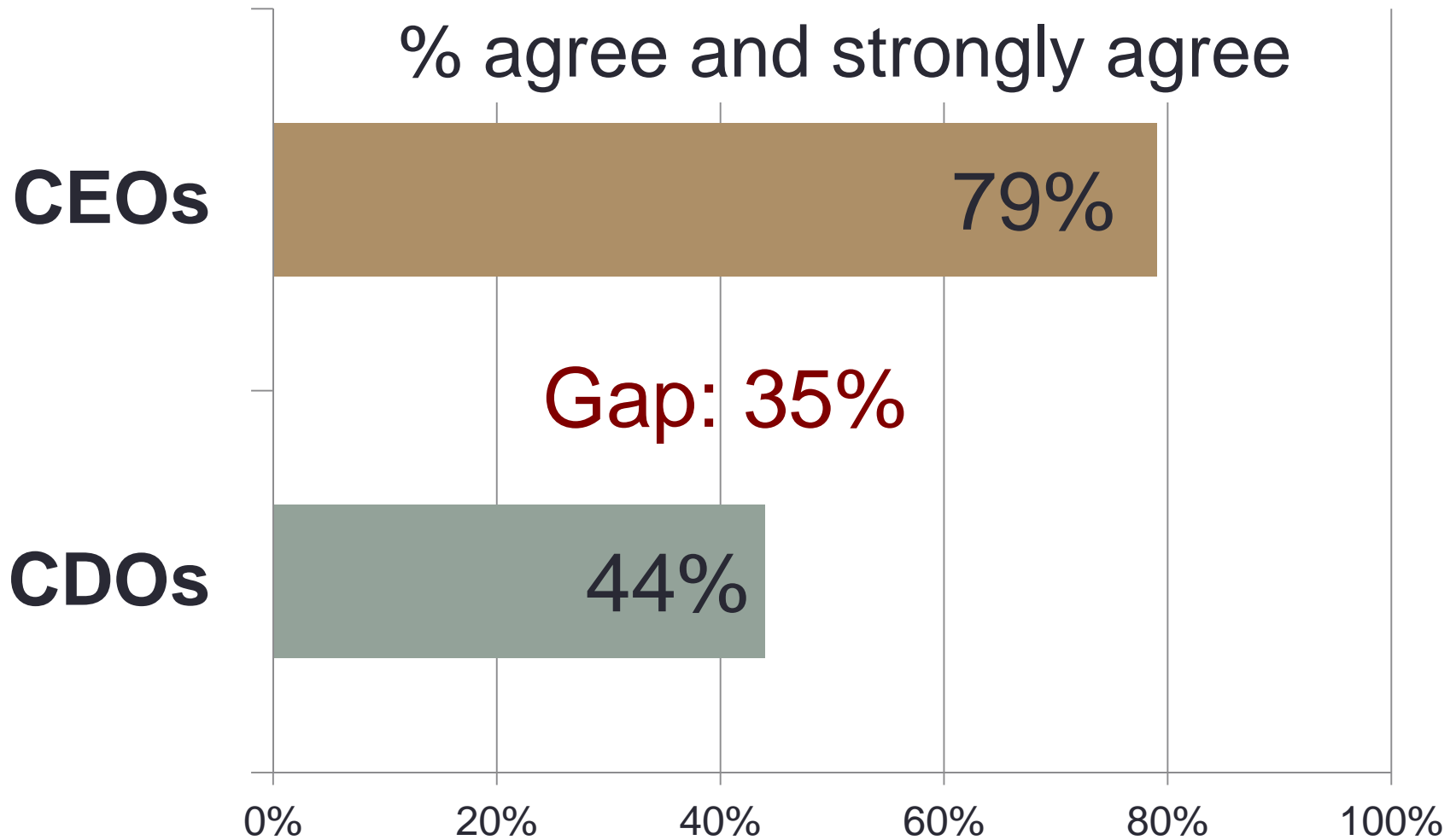
“ ... consider the foundation board his partners, not competitors.”

“... let the foundation board and staff be part of his efforts.”

“ ... consider the foundation and private philanthropy an integral part of the college’s operations.”

“Coordinate community visits better with the foundation.”

CEO Is Chief Fundraiser



SUCCESS FACTORS

Experience

% with at least four years of experience

Funds raised	CEOs	CDOs
>\$1.5 million	57%	70%
\$500,000-\$1.49 million	56%	68%
<\$500,000	42%	45%

Years Together

% with at least four years together

Funds raised	CEOs	CDOs
>\$1.5 million	43%	43%
\$500,000-\$1.49 million	40%	47%
<\$500,000	18%	30%

CEO Time Spent Fundraising

% spending at least 25% of time fundraising

Funds raised	CEOs
>\$1.5 million	43%
\$500,000-\$1.49 million	24%
<\$500,000	16%

CEO/CDO Interaction

% interacting at least daily

Funds raised	CEOs	CDOs
>\$1.5 million	57%	30%
\$500,000-\$1.49 million	52%	23%
<\$500,000	26%	17%

CDO on Management Team

% indicating CDO is on management team/cabinet

Funds raised	CEOs	CDOs
>\$1.5 million	86%	68%
\$500,000-\$1.49 million	76%	59%
<\$500,000	55%	57%

Maturity

% indicating program is established (emerging or mature)

Funds raised	CEOs	CDOs
>\$1.5 million	71%	43%
\$500,000-\$1.49 million	44%	19%
<\$500,000	14%	9%

CLOSING PERSPECTIVES

Presidential Perspectives

One thing my chief fundraiser could do more effectively to contribute to my success in my fundraising role is ...

Presidential Perspectives

Strategy

“...be more formal in planning and implementing an advancement agenda.”

“...prepare a more detailed implementation strategy.”

“....develop and implement a plan with clear objectives and benchmarks.”

“...go beyond golf tournaments, campus funds, etc.”

“...set goals for fundraising growth.”

Presidential Perspectives

Prospect Development

“...be more proactive in looking for potential donors.”

“...bring donors to campus more often.”

“...expose me to individuals who can make substantial gifts.”

“...qualify potential donors and their specific interests with profile data and background information.”

Presidential Perspectives

Positioning

“...facilitate my stewardship with donors.”

“...research and set up opportunities for me to meet with potential donors.”

“...involve me more in donor cultivation and stewardship. Make more introductions and use me more strategically in conversations with donors.”

“...prepare me for meetings so that I do not come in ‘cold’ and be expected to lead the ... conversations.”

Chief Fundraiser Perspectives

One thing my CEO could do more effectively to contribute to our fundraising success is ...

Chief Fundraiser Perspectives

Engagement

“... be interested in fundraising, encourage a culture of philanthropy and, in short, ‘give a damn.’”

“...be more engaged in the fundraising process (participate in regular prospect management meetings, prospect identification, cultivation and stewardship activities) in a strategic way.”

“...assist in getting the campus to understand the importance of private support for the college.”

“...be more actively engaged in strategic planning for prospect cultivation and solicitation.”

Chief Fundraiser Perspectives

Asking

“...ask for a gift.”

...do a “better job of cultivating and timing the ask.”

“...understand the complete donor ask process.”

“...know that it is o.k. to ask people for money, that some people will say ‘no’ and still be committed to the college.”

Chief Fundraiser Perspectives

Time

“...time, time time ... there are always competing interests for time in his schedule. Operational issues take precedence.”

“...allocate adequate time to cultivate ... and work with donors.”

“...block out time consistently each week to engage in fundraising activities.”

“...spend more time in the community.”

Presidential Perspectives

One thing my chief fundraiser does effectively to contribute to my success in my fundraising role is ...

Presidential Perspectives

Communication

“...keeps me informed about all foundation activities—in short, no surprises.”

“...keeps me informed of donor cultivation efforts and deploys my participation when appropriate.”

“...keeps me informed on local and state matters related to fundraising.”

“...keep each other fully informed regarding all contacts with donors and prospective donors.”

Presidential Perspectives

Support

“...researches all donors and gives me their profiles.”

“...understands best how to use me and play off of my interests and talents.”

“...is a good organizer ... advises when I need to give attention to a person or area, and we bounce ideas off each other.”

“...complements my strengths and weaknesses and my lack of time to spend everywhere I should be.”

Presidential Perspectives

Cultivation

“...truly understands the cultivation process so when I am called upon everything is already ‘teed up.’”

“...has extensive knowledge of the community and old/new money families and foundations.”

“...keeps prospective donors informed about key issues facing us.”

“...has a great ability to work with potential donors prior to my meeting and talking with them.”

Chief Fundraiser Perspectives

One thing my college/district CEO does effectively that contributes to our fundraising success is ...

Chief Fundraiser Perspectives

Donor Relations

“...builds genuine, purposeful relationships.”

“...makes cultivation and stewardship personal visits, goes on asks ...attends foundation board meetings.”

“...is an active and visible steward for the college.”

“...spends time developing potential donors and relationships with donors; spends time sharing the vision of the college and the foundation.”

Chief Fundraiser Perspectives

Advocacy

...serves as a “champion of fundraising, alumni relations and marketing/communications.”

“...provides funding for the college and the foundation to participate extensively in community outreach with business and organizations; is strongly committed to growing our fundraising efforts.”

“...has strongly supported the expansion of marketing and development staff.”

“...allows me to do my job, make decisions and take action as I see appropriate; supports me.”

Chief Fundraiser Perspectives

Inspiration

“...very effectively articulates the vision he has for the college.”

“...sets a strong tone for institution and consequently those in the community have a high appreciation [that] in turn motivates people to give.”

“...creates an atmosphere of academic excellence and fiduciary responsibility that give donors and potential donors a sense of confidence in the institution.”

“...tells the story of the college in a compelling way with a special passion for students and learning.”



THANK YOU!

John Lippincott

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