

Working with Leadership

Creating an Effective Partnership
Between Development and Executive Directors



2019 Petrus Leadership Conference
June 23-26 | Oklahoma City, OK



Who's on your development bus?



Everybody in your org needs to be a development officer



Everybody in your org needs to be a development officer



Especially the Executive Director



Stanford's 2015 Survey of Board of Directors showed that while only 45% of non-profits *required* their Executive Directors to fundraise, 90% of ED's believe "that fundraising is as important or more important than their other obligations as directors"

92% make a personal donation to their organization.



Executive Director's Primary Role in Fundraising

- Build and Steward Donor Relationships
- Ask for Donations
- Set Long Term Strategic Plan
- Supervise the Development Officer



Development Officer's Role in Fundraising



How to work more effectively with E.D.

1. Manage Expectations
2. Be Clear in Responsibilities
3. Synergize
4. Communicate



Manage Expectations

- It is critical to the success of the organization that the ED is on board and supportive of the Development Office and Development Officer
- Establish annually what the expectations the ED has for the Development Officer, this includes:
 - Dollar Goals
 - Activity
 - Reporting
- In annual planning, establish exactly how much the ED will be involved in development



Be Clear in Responsibilities

Establish with ED, if they should be involved in:

- Creating annual development plan
- Special events
- Prioritizing development initiatives
- Prioritizing major donor outreach
- Setting up appointments
- Serving as key contact for some donors
- Other duties as assigned



Synergize

- Use Executive Directors strategically and precisely
- Even if everybody wants to meet the Executive Director, the ED cannot do it all
- Start with how much time your ED can spend on development work in any given week/month/semester and prioritize what they should take on
- Play to your individual strengths



Synergize

May be the BEST use of Director's time

- Strategizing with Development Officer
- Appointments/calls with Donors
- Follow up on Solicitations
- Board Engagement
- Setting the Development Officer up for Success

May NOT be the best use of Director's time

- Managing Volunteers
- Micromanaging Development Office
- Signing Acknowledgements
- Writing up Call Reports
- Attending Community Events
- Proofing Newsletters and Appeals



91 Percent of 1,000 Employees Say Their Bosses Lack This 1 Critical Skill

Source: Inc Magazine. Data extracted from Interact/Harris Poll



Communication



Survey results: how execs fall short on communication

- Not recognizing employee achievements -- reported by 63 percent of respondents
- Not giving clear directions -- 57 percent
- Not having time to meet with employees -- 52 percent
- Refusing to talk to subordinates -- 51 percent
- Taking credit for others' ideas -- 47 percent
- Not offering constructive criticism -- 39 percent
- Refusing to talk to people on the phone/in person -- 34 percent



Insist on effective communication

- Regular meetings with key lieutenants (Program, Operations, Finance, Director of Ministry, Development Officer, Executive Director)
- Weekly or bi-weekly meetings for Director and Development Officer
 - What you need from ED
 - What ED needs from you
 - Strategy for gift prospects
 - Outstanding business
 - Follow up calls if needed



How you can improve communication

- Monthly written report from Development Officer
 - YTD dollars raised
 - Previous YTD dollars raised
 - Reason for variance
 - # appointments from previous month (disc, cult, solicit, stewardship)
 - Projects underway
- Annual Appraisal



Communication with Advisory Board

- Assure the board knows what you are up to – report in meetings and send successes out in emails
- Give them opportunities to get involved in your work
 - Introducing potential donors
 - Set up donor appointments
 - Accompany donor appointments
 - Write endorsements
 - Get underwriters and sponsors for events
- Send surveys out to your Board to see how they think they can be better utilized



Questions??

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