

BUILDING THE TEAM: THE JOURNEY FROM FEAR TO BOLD ASKING™ (PART 5)

(Part 5 in an 8-part series of topics to contemplate in major gift fundraising. This series of blogs is designed for boards, CEOs and advancement staff.)



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On a recent blustery Sunday morning during the New Year holiday, my three-year old grandson, Walker, and I pulled out a couple of board games. We enjoy hanging out together, but on this particular single-digit temp. morning, I was eager to find indoor activities that would be fun and occupy my very active grandson for a while. Little did I know that our morning games would become a lesson in cooperative work and, together, winning! As I read the instructions to several games to Walker, the same theme became apparent: the object of the games was not just winning. The real objective was learning how to cooperate and collaborate. In each game, cooperative work led to winning. In one game, players were even encouraged to ask other players for help! The rules of one game, which encouraged teamwork to find objects hidden on the board, stated, “To win, you need a combination of LUCK, SKILL and TEAMWORK. You may not win the first few times you play, but keep trying, you will get better.”¹ In each game, by getting help from your teammates, players are more likely to win the game, faster! The players learn how *together* they help each other and improve. I was pleasantly surprised when Walker was just as delighted in helping me find the hidden objects as he was in finding them for himself. Important life lessons, I’d say, for a three-year old, and probably for many much older!



¹ Richard Scarry’s Busytown Rules, Eye Found It.

It is well known that good teamwork is essential for optimal performance in business and non-profits, or just about any other pursuit in life. The benefits of people working together apply not only to the organization's success, they also extend to individual team members: creating shared values and mutual support, and generating a sense of belonging and



loyalty. These factors—shared values, mutual support, a sense of belonging and commitment— are all important to retaining and building an engaged workforce. One of the greatest challenges faced by fundraising programs, and the nonprofits they serve, is the frequent turnover and burn out experienced by major gift staffs and development leaders. Not only does their attrition negatively impact fundraising

achievement and donor relationships, it frequently has a dire impact on the rest of the team's morale. Recruiting highly accomplished development staffs is yet another challenge. So, as we begin the new year, there are many reasons to make a conscious commitment, maybe even a resolution, to nurturing the many teams that are essential to your high performing philanthropy program.

Effective teams require deliberate, intentional work and planning. Designing and creating an effective team is *not* something that can just be developed over the course of a retreat and filed away. The team's work and their unique partnerships must regularly be revisited, evaluated and realigned. Teams are organic and the plan to support their work must reflect this dynamic nature, and be ready to change.

“If everyone is moving forward together, then success takes care of itself.”

— Henry Ford.

Let's start by thinking about what is needed in high performing philanthropy teams. Certainly, the philanthropy staff is one place to start. Building a staff structure that reflects the organization's philanthropy plans and needs, and has the right seats with the right people in them is essential. Much of your philanthropy staff structure and teams may be fairly static until there is a major change or opportunity, like a campaign, or a challenge such as a merger. Occasionally, there are opportunities within the philanthropy program to create collaborative cross-partnerships to address a special need. These are wonderful opportunities for expanding team relationships and work styles. But, the philanthropy staff is only one part of the equation in building the type of teams that are essential to a high performing program.

I want us to examine the powerful partnerships and teams that make the difference in elevating a philanthropy program from good to great to preeminent. Experienced, successful philanthropy officers learned early on that philanthropy is a team sport. There may be one or two people who bring the secret sauce to the work and perhaps serve as a rain-maker, but rarely is success the result of just one person's efforts.



Take a few minutes to think about the partnerships and teams that you would craft “in your perfect world”. What kind of teams do you need and who do you need on your team? How many teams and partners do you need to elevate your philanthropy program and achieve your institution's goals? While you're considering the type of teams needed, think about the teams and partnerships you've participated in that have been successful and personally rewarding. What made them so?

“Alone we can do so little. Together we can do so much.” — Helen Keller

As you consider your team, remember, it takes great leadership to build great teams. Much like major gift fundraising, building a high performing team requires a leader who has a keen understanding the individual members and an appreciation of the strengths and weaknesses each brings to the team. It is important to understand what gets them excited—what do they want to achieve individually and as a group. And, ultimately, the team and its individual members must have a shared purpose.

So, first let's figure the team you need to create and then let's turn our attention to how you create a powerful partnership with those team members. Below is a toolkit to help you do this.

Toolkit V: Building the Team.

This is an exercise for the Chief Development Officer

Make a list of the people who you would like on your leadership philanthropy team. The nature of the people on that list will vary depending on the character of your institution. But, if I'm a chief development officer at a hospital or hospital foundation, here are the

people I would want on my leadership team. If I'm at an educational institution or social services agency, the list will change some but many of the players are interchangeable:

1. *The CEO*, first and foremost. The person is probably your most important partner. He or she must be a part of your team, in some way shape or form. It will vary depending on the CEO's nature. If there's a problem there, you're going to have to figure out a very strong alternative and then mold that partnership to fill in for the CEO. If you're going to have a high performing program, philanthropy must be among the CEO's top priorities and time commitments.
2. *A Champion*. This could be an internal or an external leader who believes in the philanthropy program, serves as an advocate, and is there to lend an ear, help solve problems and champion the program internally and externally. This person helps, much like the CEO, to build your philanthropic culture. Nurture this relationship and never, ever take it for granted!
3. *The Chief Medical Officer*. If you work for a hospital or a hospital foundation, the importance of strong physician relationships and partnerships is probably not lost on you. A productive, trusted relationship with the CMO and/or department chiefs can be one of the most critical factors in helping to build fruitful physician partners. The CMO helps to provide access, sometimes serves as another extension to the CEO, can steer you through challenging political waters, and most importantly, will help you shape the philanthropic culture. If properly cultivated, the CMO or a similarly powerful department chief, can serve as one of your most powerful allies and philanthropy partners. The ROI on the time spent with the CMO on education, relationship building, and together fostering the philanthropic culture can be enormous.
4. *The CFO*. Maybe an unsuspecting partner, but I have found that a CFO who values philanthropy and the culture of philanthropy, can be a part of your secret sauce in the philanthropy program and an important internal ally. More likely than not, this relationship will need to be nurtured. Some education can go a very long way in helping to achieve success with internal peers. The CFO is also critical to your philanthropic strategic planning and should be a full partner in this effort.
5. *The Chief Marketing and Communications Officer*. The person and their staff can be one of your most powerful partnerships. There are real opportunities for win-wins between the philanthropy and communications/marketing functions. Philanthropy is all about communication and using communication strategically to build relationships with your donor partners and the community. Communications officers can help to expand the tools in your tool kit and create important internal allies. Look for ways that you can be stronger together and how the philanthropy work helps to impact the marketing and communications functions. Some of the



most powerful, successful and downright fun partnerships throughout my career have been with communications and marketing colleagues.

6. *Another Physician Leader.* This is someone who is a willing, warm and adept partner and who carries influence in the community. We need several voices within the physician community, both for internal and external relationship building. Building a partnership with another influential physician who can help serve as a voice extender for the philanthropy program will help magnify the work of a busy CMO and provide additional partnerships for others in the philanthropy staff. I recommend identifying and cultivating at least one physician partner with each frontline development officer. They need will need these partnerships. And, soon, an even larger team of physician partners will be created!
7. *Board or Philanthropy Committee Chair.* Last, but certainly not least, the board and philanthropy committee chairs are essential team members. This crucial partner could just as easily be number 2. and 3. on my list. But, I find that oftentimes, we forget about our internal partners and concentrate exclusively on our external partners. Our external work is certainly where the action ultimately needs to be, but it is critical that we are architects for nurturing broad institutional relationships. Without our internal team fully in place, our external work will be significantly hampered.

Now that you've identified the players on your team, below are some tips that are important to creating powerful and effective partnerships with your team members:

1. *Know your team:* what are their individual and collective strengths? What does each person uniquely bring to the table? Build relationships with them individually and as a group. Understand how they think. What are their concerns and weaknesses. How can you best utilize their competencies while identifying others that can fill in the gaps?
2. *Nurture your champions.* When things get tough, your champions will help to keep things moving forward, or provide you the motivation you need.
3. *Define roles:* Each team member needs to understand their role in philanthropy and the reason they are on the team. What do they bring to the philanthropy table and what are your expectations for them? Be transparent. Ask them about their role in philanthropy and what they feel they can reasonably contribute.
4. *Build commitment to your shared goals for the organization.* Support and trust are critical to the team's performance and certainly to a philanthropy program.
5. *Proactively provide feedback on the team's achievements collectively and individually.* Make sure the entire team is aware of where they are going as a team and where and how we can help each other.



6. *Acknowledge* contributions to achieving goals. Think of all the settings these contributions can be acknowledged and make sure they are being utilized. Make sure that you are not the only one doing the acknowledgement of the team's success. It can come from many corners.
7. *Celebrate* successes. Such an important lesson. The team needs to be able to celebrate the big and the little successes along the way.
8. *Evaluate* and re-tool and course correct, especially in a dynamic environment. No team is static. Organizations are fluid. Team members will come and go and roles may change. Set a regular time to evaluate, re-tool and course correct. Don't keep doing things the same old way. Be ready to change
9. *Communicate, communicate, communicate.* Finally, communication is a key to success. Don't assume all the team members are on the same page. Find various channels for communication. Rarely is over communication a fault. Rather assuming goals and the road to achieving them are well understood can be a risky misstep.

Ultimately, your team will be instrumental in not only the institution's philanthropic success, it will help to create and sustain a robust philanthropic culture!

So, much like our board game, your philanthropic program's long-term success will be rooted in *a little LUCK, a whole lot of SKILL* and *carefully crafted TEAMWORK*. Best wishes in that pursuit!

About the author: Susan Holt is the founder and president of Vision Philanthropy Group, a full-service philanthropy and fundraising communications consulting firm specializing in health care, biomedical sciences and education philanthropy. Susan has partnered with others in creating gifts ranging from \$1M to \$250M and has been the architect of multi-million and billion+ campaigns. VPG is based in Nashville, TN.

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