MIND THE GAP
ENHANCING INTERNAL RELATIONSHIPS
FOR FUNDRAISING SUCCESS

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Montgomery County Community College
Rae Goldsmith, Vice President, Advancement Resources, CASE
Karen A. Stout, Ed.L.D., President, Montgomery County Community College

Agenda

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

Who’s in the room?
- Development staff only
- Presidents/CEOs only
- Foundation board members only
- Development staff and presidents/CEOs
- Development staff and/or presidents/CEOs and foundation board members

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

- >7,500: 23%
- 2,501-7,500: 45%
- <2,500: 32%

CDOs

- >7,500: 46%
- 2,501-7,500: 32%
- <2,500: 21%

Private Support Raised*

- >$5 million: CEOs 3% / CDOs 4%
- $1.5 million-$5 million: CEOs 7% / CDOs 23%
- $750,000-$1.5 million: CEOs 20% / CDOs 26%
- $500,000-$750,000: CEOs 16% / CDOs 13%
- <$500,000: CEOs 84% / CDOs 34%

*most recent fiscal year
Years Working Together

<table>
<thead>
<tr>
<th></th>
<th>1 to 3 yrs</th>
<th>4 to 10 yrs</th>
<th>11 + yrs</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEOs</td>
<td>71%</td>
<td>26%</td>
<td>3%</td>
</tr>
<tr>
<td>CDOs</td>
<td>60%</td>
<td>34%</td>
<td>6%</td>
</tr>
</tbody>
</table>

CEO/CDO RELATIONSHIP
**CEO/CDO Have Effective Relationship**

- **% agree and strongly agree**
  - CEOs: 82%
  - CDOs: 76%

**Gap:** 6%

**CDO uses CEO’s Time Effectively**

- **% agree and strongly agree**
  - CEOs: 72%
  - CDOs: 76%

**Gap:** 4%
CDO Prepares CEO for Donor Meetings

- CEOs: 71% agree and strongly agree
- CDOs: 79% agree and strongly agree

Gap: 8%

CDO Helps CEO Improve in FR Role

- CEOs: 53% agree and strongly agree
- CDOs: 62% agree and strongly agree

Gap: 9%
Frequency of Interaction

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

Karen Stout
President (11 years)

Sharon Beales
VP, Development & External Relations (2 years)

- Two campuses in suburban Philadelphia
- More than 18,000 credit students and 12,600 non-credit students
- $1 million raised last year in private giving
- Five full-time fundraising staff
THE CEO AS FUNDRAISER

CEO Understands FR Process

<table>
<thead>
<tr>
<th></th>
<th>% agree and strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEOs</td>
<td>89%</td>
</tr>
<tr>
<td>CDOs</td>
<td>63%</td>
</tr>
</tbody>
</table>

Gap: 26%
CEO Is Comfortable with Asking

- CEOs: 82% agree and strongly agree
- CDOs: 55% agree and strongly agree
- Gap: 27%

CEO Actively Cultivates Donors

- CEOs: 77% agree and strongly agree
- CDOs: 60% agree and strongly agree
- Gap: 17%
CEO Actively Stewards Donors

% agree and strongly agree

- CEOs: 68%
- CDOs: 59%

Gap: 9%

CEO Spends Appropriate Time in FR

% agree and strongly agree

- CEOs: 44%
- CDOs: 30%

Gap: 14%
## CEO Time Spent on Fundraising

<table>
<thead>
<tr>
<th>Amount of CEO’s time spent on fundraising is approximately ...</th>
<th>CEOs</th>
<th>CDOs</th>
</tr>
</thead>
<tbody>
<tr>
<td>50-74.9 percent</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>25-49.9 percent</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>10-24.9 percent</td>
<td>44%</td>
<td>34%</td>
</tr>
<tr>
<td>Less than 10 percent</td>
<td>34%</td>
<td>50%</td>
</tr>
</tbody>
</table>
GOALS AND RESOURCES

College/District Has Realistic FR Goals

% agree and strongly agree

CEOs: 71%
CDOs: 53%

Gap: 18%
FR Goals Support Aspirational Giving

% agree and strongly agree

- CEOs: 52%
- CDOs: 57%

Gap: 5%

CDO Has Resources to Grow Giving

% agree and strongly agree

- CEOs: 55%
- CDOs: 24%

Gap: 31%
Poll

What is your college’s fundraising goal for the current fiscal year? (Not including grants or pledges.)
• Less than $500,000
• $500,000-$750,000
• $750,000-$1.5 million
• $1.5 million-$5 million
• More than $5 million
• Don’t know
• We do not have a fundraising goal

BOARDS AND ROLES
CDO Is on Senior Management Team

- % yes
  - CEOs: 66%
  - CDOs: 61%
  - Gap: 5%

CEO Engages Foundation Board

- % agree and strongly agree
  - CEOs: 67%
  - CDOs: 52%
  - Gap: 15%
Boards Have Shared Mission, Vision

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>CEOs</td>
<td>68%</td>
</tr>
<tr>
<td>Gap: 19%</td>
<td></td>
</tr>
<tr>
<td>CDOs</td>
<td>49%</td>
</tr>
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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

Gap: 35%

% agree and strongly agree

CEOs: 79%

CDOs: 44%
SUCCESS FACTORS
## Experience

% with at least four years of experience

<table>
<thead>
<tr>
<th>Funds raised</th>
<th>CEOs</th>
<th>CDOs</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;$1.5 million</td>
<td>57%</td>
<td>70%</td>
</tr>
<tr>
<td>$500,000-$1.49 million</td>
<td>56%</td>
<td>68%</td>
</tr>
<tr>
<td>&lt;$500,000</td>
<td>42%</td>
<td>45%</td>
</tr>
</tbody>
</table>

## Years Together

% with at least four years together

<table>
<thead>
<tr>
<th>Funds raised</th>
<th>CEOs</th>
<th>CDOs</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;$1.5 million</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>$500,000-$1.49 million</td>
<td>40%</td>
<td>47%</td>
</tr>
<tr>
<td>&lt;$500,000</td>
<td>18%</td>
<td>30%</td>
</tr>
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</table>
CEO Time Spent Fundraising

% spending at least 25% of time fundraising

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<td>43%</td>
</tr>
<tr>
<td>$500,000-$1.49 million</td>
<td>24%</td>
</tr>
<tr>
<td>&lt;$500,000</td>
<td>16%</td>
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</table>

CEO/CDO Interaction

% interacting at least daily

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<tr>
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<th>CDOs</th>
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<td>52%</td>
<td>23%</td>
</tr>
<tr>
<td>&lt;$500,000</td>
<td>26%</td>
<td>17%</td>
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## CDO on Management Team

% indicating CDO is on management team/cabinet

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<thead>
<tr>
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<th>CDOs</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;$1.5 million</td>
<td>86%</td>
<td>68%</td>
</tr>
<tr>
<td>$500,000-$1.49 million</td>
<td>76%</td>
<td>59%</td>
</tr>
<tr>
<td>&lt;$500,000</td>
<td>55%</td>
<td>57%</td>
</tr>
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## Maturity

% indicating program is established (emerging or mature)

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<td>43%</td>
</tr>
<tr>
<td>$500,000-$1.49 million</td>
<td>44%</td>
<td>19%</td>
</tr>
<tr>
<td>&lt;$500,000</td>
<td>14%</td>
<td>9%</td>
</tr>
</tbody>
</table>
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.”
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 …

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.”
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.”

Karen Stout
President

Sharon Beales
VP, Development & External Relations
### Presidents, try asking …

- Who are the biggest donors in the last week/month/quarter, and how can I help thank them?
- What do you need from me to cultivate people on your major gift list?
- How did I do on the last donor visit? Suggestions for improvement?
- Where is my time best spent to assist, and where am I not needed?
- Do you feel comfortable telling me what I need to hear, even if I don’t want to hear it?
- How are you doing…really?

### Fundraisers, try asking …

- Are you getting the fundraising information you want and need, in a manner that works for you?
- How can I make more effective use of your limited time?
- How else can I help you accomplish your goals for the college?
- What are our fundraising goals and priorities?
- How are you doing…really?
Starting the conversation

Community College CEO/Chief Development Officer Survey Report

Do community college presidents believe they’re getting adequate support from chief fundraisers? Do fundraisers believe that their CEOs understand their roles in fundraising success?

In summer 2012, CASE conducted parallel surveys of community college CEOs and chief development officers to gather their perspectives on their roles and relationship. Findings were presented at the inaugural 2012 CASE Conference for Community Colleges Advancement and are reflected in the presentation below.

THANK YOU!