



HEALTHCARE PHILANTHROPY LEADERSHIP ESSENTIALS

Keys to Strong Working Relationships in the Executive Suite

A study by Advancement Resources in partnership with Association for Healthcare Philanthropy





Advancement Resources is a world leader in research-based professional education and breakthrough thinking in philanthropy.

Our comprehensive array of services helps organizations optimize the tremendous opportunity in healthcare philanthropy—for the benefit of your patients, families, and the communities you serve.

Utilizing more than 15 years of expertise in medical, academic, and nonprofit philanthropy, we work with organizations to provide solutions that help them realize their full philanthropic potential from all areas of the organization: development professionals, organizational leadership, medical and healthcare professionals, deans and academic leaders, faculty, volunteers, and support staff.

Association for Healthcare Philanthropy (AHP) is an international professional organization dedicated exclusively to development professionals who encourage charity in North America's healthcare organizations. Established in 1967, AHP is the source for education, networking, information, and research in healthcare philanthropy. AHP is a not-for-profit organization with its headquarters located right outside Washington, DC, in Falls Church, VA.

AHP's 4,500 members represent more than 2,200 health care facilities around the world. They embody all aspects of healthcare fundraising, from executive directors and chief development officers, to major gift officers, annual campaign managers, event coordinators, and grant writers.

Advancement Resources and Association for Healthcare Philanthropy would like to extend a sincere thank-you to each and every participant of this study who contributed to the creation of this report, either through completing the online survey or conducting in-depth interviews with our research team. This can be a sensitive topic to discuss, and we are grateful for the many development professionals and healthcare executives who trusted us enough to share their candid thoughts and experiences. This report would not have been possible without them.

Advancement Resources Research Group

Project Director
Lauren A. Laur

Contributing Authors
Venancio Batista-Pedro
Ann Franzenburg
Lauren A. Laur

Contributing Researchers
Mauria Brough
Dan Geiser
Lauren A. Laur
Venancio Batista-Pedro

Graphic Designer
Aliya Musselman

Healthcare Philanthropy Leadership Essentials—Keys to Strong Working Relationships in the Executive Suite is a 2018 copyright of Advancement Resources and was researched and written by Advancement Resources in partnership with Association of Healthcare Philanthropy. All rights are reserved. No portion of this publication may be reproduced in print or electronic form without express permission of Advancement Resources.

Visit www.advancementresources.org/contact to request permission or for media inquiries regarding this report. Industry speakers and thought leaders are encouraged to request permission in order to quote this report for presentations, texts, blog entries, etc. No reasonable request will be denied providing the requester agrees to cite Advancement Resources.

HEALTHCARE PHILANTHROPY LEADERSHIP ESSENTIALS

Keys to Strong Working Relationships in the Executive Suite

A study by Advancement Resources in partnership with Association for Healthcare Philanthropy



TABLE OF CONTENTS

- Foreword 1
- How and Why to Use This Report 3
- Key Insights At-A-Glance 4

- THE FIVE KEYS TO STRONG WORKING RELATIONSHIPS 5**
 - KEY I. Shared Vision and Operational Knowledge 6
 - KEY II. Disciplined Attention to Communications 14
 - KEY III. Professional Confidence with Personal Humility 19
 - KEY IV. Trust-Based Engagement 26
 - KEY V. Strategic Relationship Cultivation 33

- RECOMMENDATIONS BASED ON THE FIVE KEYS 39**
 - KEY I. Shared Vision and Operational Knowledge 40
 - KEY II. Disciplined Attention to Communications 45
 - KEY III. Professional Confidence with Personal Humility 50
 - KEY IV. Trust-Based Engagement 56
 - KEY V. Strategic Relationship Cultivation 62

- STATISTICS AND FACTS 65**
 - Contextual Data 66
 - Self-Appraised Data 73
 - Comparing Positive and Negative/Neutral Relationships 80

- SUMMATION 89**
 - Methodology 90
 - Final Thoughts 91



FOREWORD

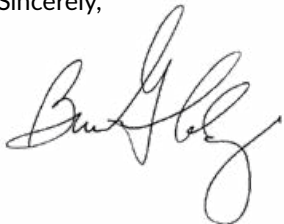
This is a crucial time for healthcare philanthropy as the organizations represented are navigating massive industry change; it is quite apparent that nearly every element of delivering care is undergoing transformation. Coupled with this change, Chief Development Officers (CDOs) and their teams are shepherding their organizations through changes in the nature of philanthropy and the dynamic expectations of those who want to be philanthropic. In order to grow healthcare philanthropy, development leaders need buy-in, institutional support, and meaningful partnerships with hospital executives. We are honored to contribute this report as a dynamic and functional tool for development leaders to leverage to improve executive suite engagement, paving the way for a vibrant culture of philanthropy that drives progress forward.

We envision that the ensuing discussion can be utilized by CDOs to address challenges with a fresh perspective, as well as offer insight into what characteristics CEOs most value in their chief fundraisers. As CDOs work in a variety of philanthropic climates, we hope the report will also provide a litmus test against which CDOs can measure their own organization's culture of philanthropy, identify strategies employed by those in similar situations, and implement practices that will advance their own culture. CEOs and other executives may also find the report informative in representing how they could become more engaged in philanthropy.

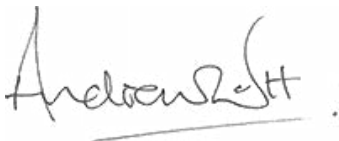
Advancement Resources and Association for Healthcare Philanthropy (AHP) are pleased to partner to produce this research as a courtesy to our partners and members. The summaries are intentionally action-oriented, with a full set of recommendations that list options for improving engagement in a vast array of circumstances, as described by industry thought-leaders during our research.

Our sincerest gratitude extends to our research participants and partners for offering their time and expertise to make this study as comprehensive and valuable as possible. Your important work is the inspiration for ours.

Sincerely,



Ben Golding, Chief Operating Officer
Advancement Resources



Andrew Watt, Interim President and Chief Executive Officer
Association for Healthcare Philanthropy





HEALTHCARE PHILANTHROPY LEADERSHIP ESSENTIALS— A GUIDE TO STRONG EXECUTIVE SUITE RELATIONSHIPS

At Advancement Resources, we are privileged to work closely with healthcare development teams across the world. The healthcare industry has evolved to a degree that philanthropy is positioned for more wide-reaching strategic impact than ever—but this impact cannot be realized without the engagement and buy-in of the organization's executive suite—and particularly, its chief executive officer (CEO). Years of ongoing research have revealed widespread struggle among development leaders to leverage strong working relationships with CEOs to achieve greater philanthropic success. (For the purpose of this study, all development leaders are referred to as chief development officers or CDOs*.)

Our aim in creating this report was to deliver a comprehensive, systematic, and insightful analysis of the current state of CDO-CEO relationships, and to use that analysis to create a set of recommendations to elevate executive suite engagement.

HOW AND WHY TO USE THIS REPORT

This report not only features a number of telling statistics and facts based on an extensive survey of over 130 CDOs, but also key insights derived from over 30 hours of comprehensive interviews with CDOs and CEOs from across the USA and Canada.

This report has been designed in a modular fashion so that it may be utilized to respond to practical issues. It can also be read as a thorough compendium of current trends in executive suite philanthropic engagement.

The first section of this report explores The Five Keys to Strong Working Relationships, which explains and identifies the Five Keys and offers additional insights through direct quotes from anonymous interviewees and relevant statistical trends.

The second section of the report presents practical advice and recommendations of what can be done to improve CDO-CEO relationships in each of the five key areas.

The report's third and final Statistics and Facts section presents the current state of healthcare philanthropy leadership, uncovering information about the field as a

whole and revealing key distinguishing features that separate positive relationships from negative/neutral ones. Features include Contextual Data, which provides demographic/psychographic information about today's healthcare CDOs; Self-Appraised Data, which provides insight into how today's healthcare CDOs think and feel about their executive suite relationships; and Comparing Positive and Negative/Neutral Relationships, which compares the results of the survey by positive and negative/neutral CDO-CEO relationships. This comparison yields insight into what strategies are most and least effective in executive suite relationship building.

For a more in-depth explanation of how the research was conducted, see the methodology section of the report.

**Top CDOs may hold several different titles. For the purposes of this report, the term "CDO" refers to the top CDO in the organization, unless expressly noted otherwise.*

Key insights into the differences between positive and negative/neutral CDO-CEO relationships



CDOs working within healthcare systems have better relationships with their CEOs than those working in stand-alone hospitals.



Positive relationships are much more likely to develop when the CEO is responsible for the CDO hiring process.



The frequency of informal meetings and discussions has a stronger correlation with CDO-CEO relationships than formal meetings.



Positive relationships are far more likely to feature predominantly face-to-face communications than negative/neutral ones.



Negative/Neutral relationships are far more likely to feature predominantly email communications than positive ones.



In positive relationships, CDOs are more confident in discussing non-fundraising topics with other executives.



In positive relationships, CEOs understand more about philanthropy.



The quality of relationship with CEOs is not related to how many active donors a CDO maintains.



Negative/Neutral relationships are more likely to exist when the CEO has a corporate vs. clinical background.



In positive relationships, CMOs and CNOs are more likely to work closely with the CDO.

For a deeper analysis of these facts and several more insights, see the full Statistics and Facts section starting on page 65.



THE FIVE KEYS TO STRONG WORKING RELATIONSHIPS

In order to promote strong CDO-CEO relationships that can be leveraged to produce robust executive suite engagement in philanthropy, this study revealed five keys to strong working relationships. This section presents the results of the study by breaking down each of the keys, as well as describes the data that confirmed these findings. For information related to how to improve and overcome challenges in each of the five key areas, please see the Recommendations section.

- KEY I. Shared Vision and Operational Knowledge 6
- KEY II. Disciplined Attention to Communications 14
- KEY III. Professional Confidence with Personal Humility 19
- KEY IV. Trust-Based Engagement 26
- KEY V. Strategic Relationship Cultivation 33



KEY I. SHARED VISION AND OPERATIONAL KNOWLEDGE

When CDOs and CEOs are questioned about what makes for a successful working relationship, several main points emerge regarding the importance of sharing a vision, especially those themes relating to valuing the role of philanthropy and how it can be used to further the aims of the organization. Their responses can be broken down into three main categories:

1. CEO'S VALUATION AND KNOWLEDGE OF PHILANTHROPY

This relates to the CEO both believing philanthropy is important and being engaged to a degree that he or she has applicable knowledge. Evidence of this quality includes inviting the CDO to participate in strategy discussions, participating willingly in donor engagement activities such as critical meetings, and being open to learning more about philanthropy.

2. CDO'S OPERATIONAL KNOWLEDGE

This quality involves CDOs recognizing a responsibility to learn about organizational operations and then taking steps to gain important knowledge in non-philanthropic areas. Evidence of this quality includes asking questions, leveraging relationships to gain expertise, and seeing oneself as an executive with a seat at the table.

3. CDO AND CEO HAVING SIMILAR IDEAS OF PHILANTHROPY'S ROLE

Those relationships most successful feature CDOs and CEOs on the same page in how they view philanthropy and its role. Evidence of this includes a collaborative approach to fundraising and setting funding priorities that are mutually agreeable and realistic.

1. CEO'S VALUATION AND KNOWLEDGE OF PHILANTHROPY

In order for the relationship between the CDO and CEO to be effective, the CEO must highly value the role that philanthropy can play in securing the organization's vision. Some would argue that, in light of the current economic environment surrounding healthcare, the CEO should understand that philanthropy is necessary for the organization to achieve its vision. Nearly all the CDOs and CEOs interviewed responded that the organization benefits when CEOs value philanthropy and have knowledge of its power. Responses suggest improving the esteem CEOs hold for philanthropy involves actively building their knowledge about the strategic process of philanthropy by involving them in the process. Overall, CDOs ranked their CEOs

toward the high end of the scale when rating how much the CEO understood about philanthropy. However, when the CDOs were asked to rank their CEOs' knowledge of specific activities and ideas related to fundraising, they gave significantly lower rankings.

Helping the organization be successful overall in achieving its vision involves making sure the CEO has more than just a passing knowledge of philanthropy and the processes involved in securing contributions. When CEOs have deeper knowledge of the process, they also tend to more highly value philanthropy. The interviews and survey results also indicated that valuing philanthropy and using philanthropy as a tool to help achieve system goals are positively aligned.



1. CEO'S VALUATION AND KNOWLEDGE OF PHILANTHROPY (CONT.)

From the Transcripts

"He [the CEO] understood that what you were doing in philanthropy and philanthropic partnerships was releasing an individual to pursue their passion and trying to make an impact through the organization. And so, it was that higher level of meaningful philanthropy that he really understood."

—Chief Development Officer

"There's got to be a full-fledged commitment by the CEO of any not-for-profit organization to make a big bet on philanthropy even in the toughest of financial times. Arguably, that's when you've gotta make an even bigger bet."

—Chief Executive Officer

"He's [the CEO] engaged at the very top, as it relates to strategy development. He's intimately involved in the moves management of transformational-giving level donors. He's got his own portfolio, probably about 10 people that he works on."

—Chief Development Officer

"We work very closely. He [the CEO] prioritizes philanthropy as one of the three most important things that he works on... ensuring that the medical center is strong and financially viable, ensuring that he is focused on strategy for the system, and then philanthropy, because it really has become a more important part of the funding mix here...as the whole healthcare environment changes and becomes more challenging."

—Chief Development Officer

"I think you'd be pretty hard pressed in hospitals to find 25% of [CEOs] that actually have fundraising in their job description, where it's contractually part of their role to raise dollars. I don't know that our CEO has it in her contract, but she acts like she does because she knows she can't get done what she needs to for this community without philanthropy. I think that's why I value that relationship, because she thinks this is as important as I do."

—Chief Development Officer

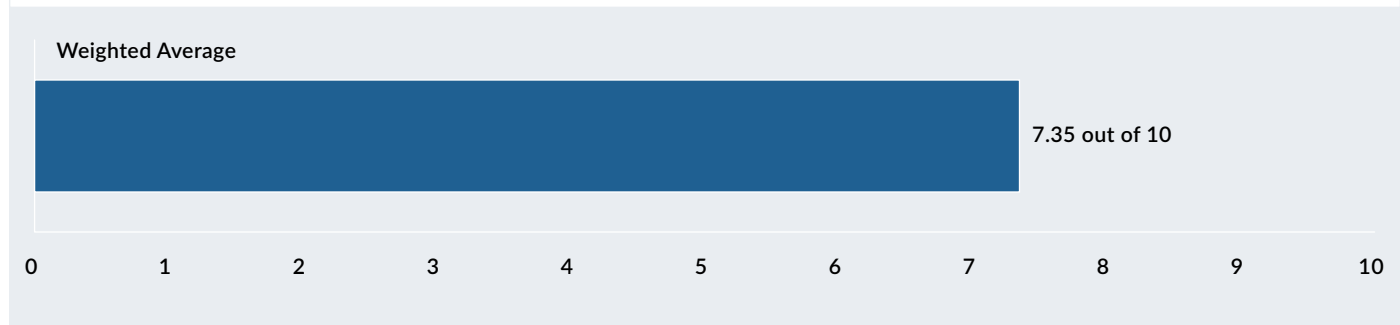


1. CEO'S VALUATION AND KNOWLEDGE OF PHILANTHROPY (CONT.)

By the Numbers

Survey results show that most CDOs give their CEOs a “passing grade” when rating their understanding of philanthropy. On a scale of 1–10, with 10 being the highest, the average rating of CEO understanding was **7.35**. The chart indicates that most CEOs have a firm grasp of the general role philanthropy can play in their organization.

1.00: How much CEOs understand about philanthropy, rated by CDO



Additionally, CDOs gave relatively good ratings to their CEOs' understanding of philanthropic strategies, such as the donor development process, the amount of time needed to secure a major gift, and major gift strategy. Engaging the CEO in the hands-on process of philanthropy was related to their overall understanding of philanthropy. CDOs that rated their CEOs at the higher end of the scale for their understanding of philanthropy also indicated that their CEOs engaged in tasks relating to fundraising.

1.01: Observed CEO behaviors, rated by CDO

CEOs with high knowledge of philanthropy*	CEOs with low/neutral knowledge of philanthropy**
Responds to CDO's informal phone calls 85.48%	Responds to CDO's informal phone calls 80.77%
Participates in donor meetings when asked 91.94%	Participates in donor meetings when asked 82.69%
Invites CDO's participation in strategic/operational meetings 79.03%	Invites CDO's participation in strategic/operational meetings 57.69%
Requests CDO's opinions 80.65%	Requests CDO's opinions 53.85%
Responds to CDO's email 90.32%	Responds to CDO's email 65.38%
Accepts CDO's feedback on fundraising topics 80.65%	Accepts CDO's feedback on fundraising topics 78.85%
Introduces CDO to VIPs 95.16%	Introduces CDO to VIPs 75.00%
Asks questions when they don't understand something relating to philanthropy 72.58%	Asks questions when they don't understand something relating to philanthropy 50.00%
Acknowledges their own shortcomings relating to philanthropy 61.29%	Acknowledges their own shortcomings relating to philanthropy 34.62%

*CEOs who were scored 8–10 for knowledge of philanthropy
 **CEOs who were scored 1–7 for knowledge of philanthropy

2. CDO'S OPERATIONAL KNOWLEDGE OF THE ORGANIZATION

Just as CEOs should have a solid understanding of philanthropy—not only at the vision level, but also at a more strategic, operational level—it's important for CDOs to have working knowledge of the organization's operations. Many CDOs desire a seat at the executive strategy table, but there's more to having a seat at the table than the prestige that seat affords. While most CEOs would never require the CDO to have an intimate understanding of each executive's area of expertise, interview responses indicate that a CDO can both add value to and gain value from participating in strategy meetings. CDOs can illuminate issues surrounding philanthropy for fellow members of the executive suite. For example, is the initiative a fundable one? Another benefit

of CDOs gaining operational knowledge is that they will have first-hand information about the problems, goals, and initiatives of their organization, preparing the CDO to better respond to questions donors might have and presenting information to key stakeholders strategically. A CDO's presence at strategy meetings lessens the chance of wasting precious time developing a gift that might be at odds with or outside the strategic goals of the organization. Furthermore, when CDOs take steps to familiarize themselves with areas of the organization that fall into their colleagues' purview, they create goodwill that may be leveraged to encourage broader executive engagement as the culture of philanthropy grows.

From the Transcripts

“Development officers want a seat at the table, but sometimes they just want it because they want everybody to understand their piece of the business, and they don't want to understand the other pieces that work for the hospital. You have to know what's going on at the hospital.”

—Chief Development Officer

“I feel like there's a tendency to be an expert in philanthropy...and not engage in the rest of the organization. So, one has to become a student of whatever organization you're working. And you have to understand not only your work, but the work of others to the point where you can be at that table, not only to speak about philanthropy, you have to speak to all of it—particularly issues that may ultimately impact philanthropic potential.”

—Chief Development Officer

“I think you optimize the development function if you make a commitment to have your chief development officer as a member of the senior operations team simply to absorb everything that's going on. So when the CDO is meeting with a potential large donor, they're conversant with all the issues that are challenging the organization. Can't imagine it being more effective any other way.”

—Chief Executive Officer

“So when I got here, what did I do? I met with every head of every department. I toured the place. I went to the operating rooms. I immersed myself in the business so that you know how to speak their language. That's one essential thing.”

—Chief Development Officer

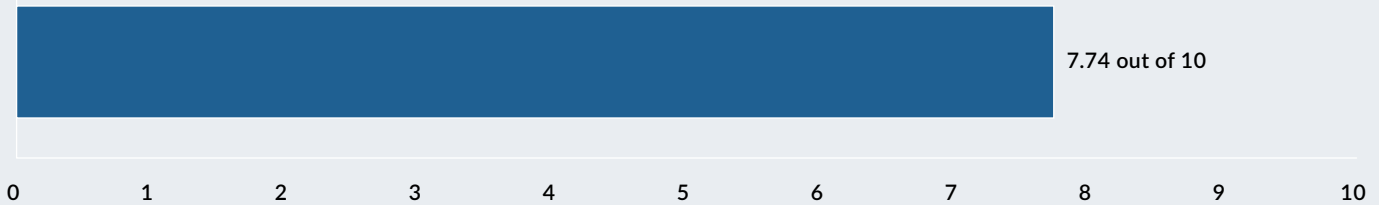
2. CDO'S OPERATIONAL KNOWLEDGE OF THE ORGANIZATION (CONT.)

By the Numbers

In the survey, most CDOs gave themselves a respectable rating in their understanding of healthcare operations, indicating that they have a moderate degree of working knowledge.

1.02: CDO's understanding of day-to-day healthcare operations

Weighted Average



CDOs also rated high the importance of having operational understanding about the organization. In addition to operational knowledge, it is important for the CDO to be a productive member of the team by delivering, when possible, on the organization's fundraising goals. Being an engaged member of the executive team also strengthens the working relationship of the CDO and CEO.



3. CDO AND CEO HAVING SIMILAR IDEAS OF PHILANTHROPY'S ROLE

While a CEO leads the process of developing the organization's strategy, the CDO is responsible for creating aligned fundraising strategies—but this is a process that should also be highly collaborative for optimal results. At the core of all successful executive suite relationships is a mutual sense of the importance of philanthropy, demonstrated through a collaborative approach to achieving goals. When a CEO is convinced of the importance of philanthropy to the organization's mission, and incorporates philanthropy into the organization's overall vision and strategy, a natural side effect of professional collaboration occurs. Furthermore, when a CEO does not view philanthropy as a

significant source of potential funding, the odds of success greatly decrease. The CDO and CEO must agree on what philanthropy can accomplish in relation to the strategy, and then they must work together to merge their two strategies.

Collaboration on strategic priorities is essential for both the CDO and CEO in accomplishing their goals. CDOs can gain two valuable things from collaborating in priority planning. First, they can increase the likelihood that organizational strategy will incorporate philanthropic strategy. Then, they can provide information to the CEO regarding feasibility for inspiring philanthropic support. Collaboration allows information to flow both ways.

From the Transcripts

“Our chief development officer has been at the table for all of those discussions so that he can understand how the priorities are being developed. At least in theory, if he had a potential donor who was interested in one type of initiative or another, by virtue of him participating, he might be able to influence how we prioritize different types of things.”

—Chief Executive Officer

“I’m trying to figure out how can philanthropy be engaged on a strategic planning level in advance as we’re developing the priorities for the hospital versus an afterthought. Rather than nickel and dime-ing it, we can set out the year by saying, ‘These are the fundraising priorities for the year because these are the hospital priorities for the year.’”

—Chief Development Officer

“I’ve seen places where there may be a grand vision, but the people who are trying to carry out the vision aren’t aware of how to operationalize that vision.”

—Chief Executive Officer

“... [My board] said to me, ‘What the hell are you doing?’ I went from a [foundation] staff of nine to a staff of 40 in about a year. They said, ‘How do you know there’s going to be a yield on it?’ I said, ‘Even if we’re the worst, there’s going to be a yield that’s infinitely better than anything else that I do.’ So why wouldn’t I just keep growing it until there’s no apparent new yield on it?”

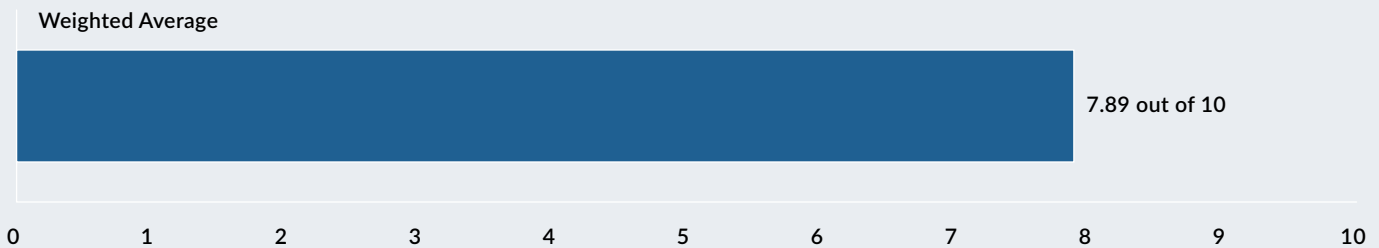
—Chief Executive Officer

3. CDO AND CEO HAVING SIMILAR IDEAS OF PHILANTHROPY'S ROLE (CONT.)

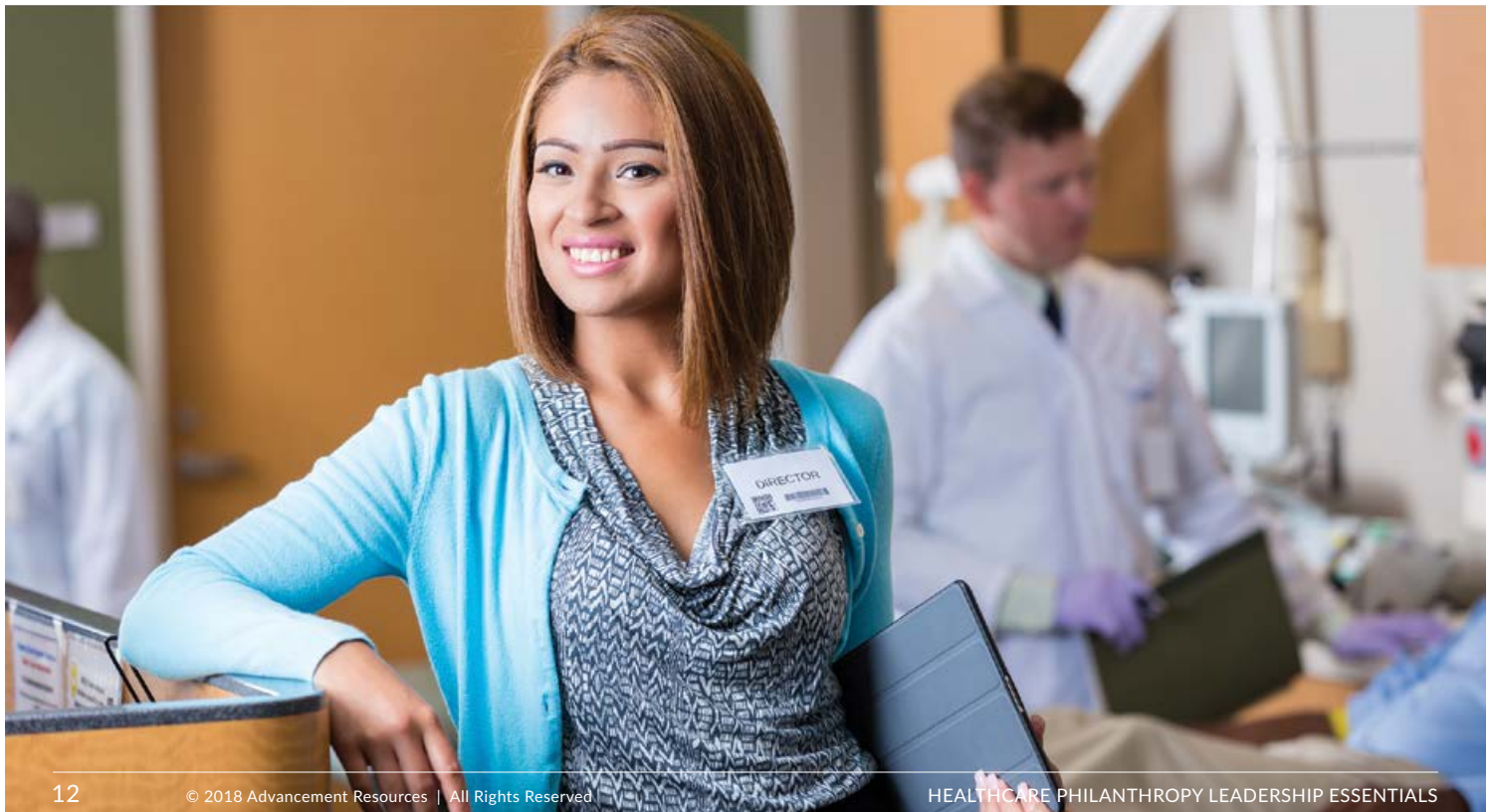
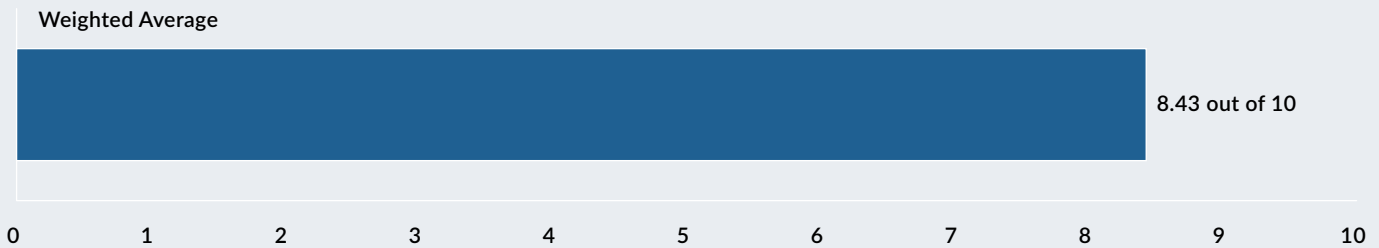
By the Numbers

CDOs rated their level of confidence in engaging with executive leadership on fundraising topics and non-fundraising topics. Their high confidence levels on these two counts indicate greater comfort collaborating with their CEOs regarding strategic priorities.

1.03: CDO confidence in engaging with executives about **non-fundraising** topics



1.04: CDO confidence in engaging with executives about **fundraising** topics



3. CDO AND CEO HAVING SIMILAR IDEAS OF PHILANTHROPY'S ROLE (CONT.)

By the Numbers (cont.)

CDOs ranked with high importance both having a seat at the table for strategic planning and meeting regularly with the CEO. These two rankings illustrate that CDOs are aware of the importance of harnessing organizational priorities and fundraising efforts.

1.05: Importance of harnessing organizational priorities and fundraising efforts



KEY II. DISCIPLINED ATTENTION TO COMMUNICATION

Several main themes emerged from the interviews and survey results regarding communication between the CDO and CEO. Both CDOs and CEOs agree that communicating in a disciplined matter is important in accomplishing the work of the organization. However, there is no “magic” amount or means of communication. The responses from the interviews and survey can be organized into three main areas:

1. COMMUNICATING REGULARLY

This area refers to having in place a standard meeting and supplementing these meetings with informal communications in which both CDO and CEO are accessible.

2. COMMUNICATING STRATEGICALLY

In successful executive suite relationships, communications were strategic in that they (1) considered the methods of communication that were most preferred; (2) focused on critical information to make the best use of time; and (3) accomplished secondary goals, such as demonstrating expertise, educating about critical philanthropy concepts, or obtaining and applying operational knowledge.

3. DISTINGUISHING BETWEEN DISAGREEMENT AND ARGUMENT

This area refers to a balance between expressing disagreement and demonstrating respect. CDOs should be strategic about the topics they choose to disagree with, the manner in which they express disagreement, and their willingness to compromise when necessary.

1. COMMUNICATING REGULARLY

In order for a working relationship to be a successful one, regular communication is essential. Data indicated that there is no “magic number” for the amount of meetings necessary for effective communication—only that these meetings should happen routinely. Most CDOs and CEOs preferred to have a routine meeting—perhaps weekly or bi-weekly—permanently on their calendars. However, there’s more to good communication than frequency. CDOs should make every effort to have an agenda for these regular meetings to ensure that time is effectively used. CDOs stressed the importance of being transparent in communicating with

the CEO. They felt it was incumbent on them to keep their CEOs apprised of potential problems. Honesty in communication is essential in developing trust. The CEOs who were interviewed all stressed the importance of being kept informed—whether the news was good or bad. Another aspect of regular communication is access. Both the CDOs and CEOs who participated in the study felt it was important for the CDO to be able to communicate as needed with the CEO when issues arose outside of their regularly scheduled meetings.

From the Transcripts

“I make myself available to her [CDO]. She has access to my schedule so that she has the freedom to schedule lunches or dinner meetings. She and my assistant work well together. My assistant knows that philanthropic efforts are a priority for our mission here in order to continue to be sustainable and to achieve our goals.”

—Chief Executive Officer

“I think some of the mistakes come from making our work so mysterious. I don’t think we do it on purpose, you know. It just seems that we don’t always do a good job communicating how we do what we do.”

—Chief Development Officer

1. COMMUNICATING REGULARLY (CONT.)

By the Numbers

CDOs and CEOs meet formally at varying frequencies. Once or twice a month was the most popular frequency. In the surveys, one CEO expressed that he preferred to meet formally once a week because if they had to miss a meeting, they weren't so far out of the loop by the time the next scheduled meeting occurred. CDOs also indicated that they communicate informally with their CEOs as well—most often once or more per week.

2.00: Formal CDO-CEO meeting frequency

	% of CDOs reported
Daily	0.00%
More than once a week	2.50%
Once a week	10.83%
Twice a month	32.50%
Once a month	40.83%
Once a quarter	12.50%
Once a year	0.83%

2.01: Informal CDO-CEO meeting frequency

	% of CDOs reported
Daily	10.83%
More than once a week	25.00%
Once a week	32.50%
Twice a month	16.67%
Once a month	13.33%
Once a quarter	0.83%
Once a year	0.83%



2. COMMUNICATING STRATEGICALLY

In addition to regular communication between the CDO and CEO, working relationships benefit from communicating strategically. CDOs should discover the CEO's personality style to aid in crafting communication and maximizing their time in meetings, and use the CEO's preferred method of communication. CDOs and CEOs both expressed that the method of communication should be appropriate for its use. For example, if a CDO needs an uncomplicated, quick answer, using a text message might be more effective than sending an email. CDOs may also reap additional benefits by strategically cultivating relationships with individuals surrounding the CEO, such as the CEO's administrative assistant.

Just as with donors, CDOs will also benefit from making all the steps in the development process transparent for CEOs. They must help the CEO to understand why the CDO performs certain functions at certain times in the development office. In addition to communicating in a transparent and honest manner, CDOs should also consider the mood of the CEO in judging when and how to deliver news or ask questions. CEOs also should seize opportunities for communication where they can.

From the Transcripts

“Call the CEO with news of large gifts to ensure they are present in the moment.”

—Chief Development Officer

“When we're coming home from a call or an event, and we're driving in the car together, then we can talk about what really needs to be said.”

—Chief Development Officer

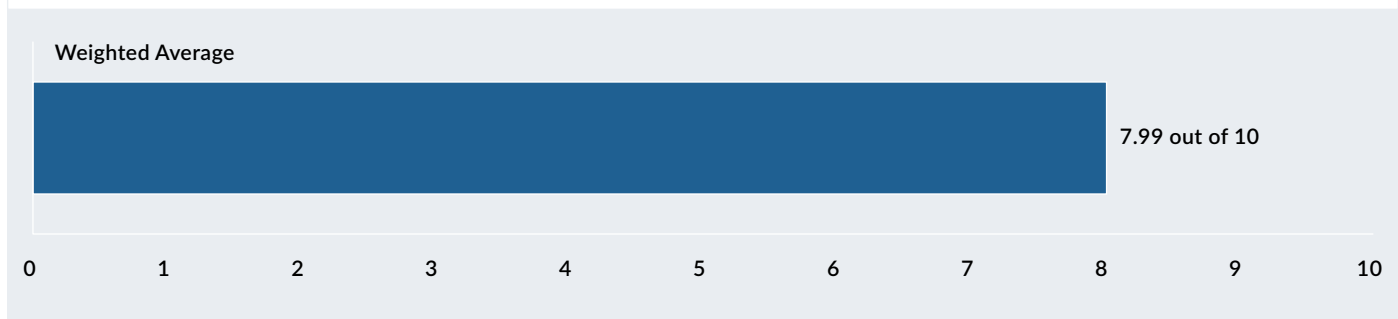
“Our CEO grew up on the accounting side as an auditor by trade, CPA, so he likes the granular information and inspects [everything] so I'm always prepared. I don't go in there just shooting from the hip. I typically have my research. I have my metrics and can document my case that way. I've worked for other CEOs that came from within operations...I think it's really dependent upon that individual and how they learn...”

—Chief Development Officer

By the Numbers

Data shows that most CDOs are relatively satisfied with the quality of communication with their CEOs. The types of preferred communication vary among CEOs. CDOs should be direct in asking the CEO's preference for communication. Data also indicates that CEOs are, for the most part, highly responsive to emails and phone calls from CDOs.

2.02: Quality of communication between CDOs and CEOs

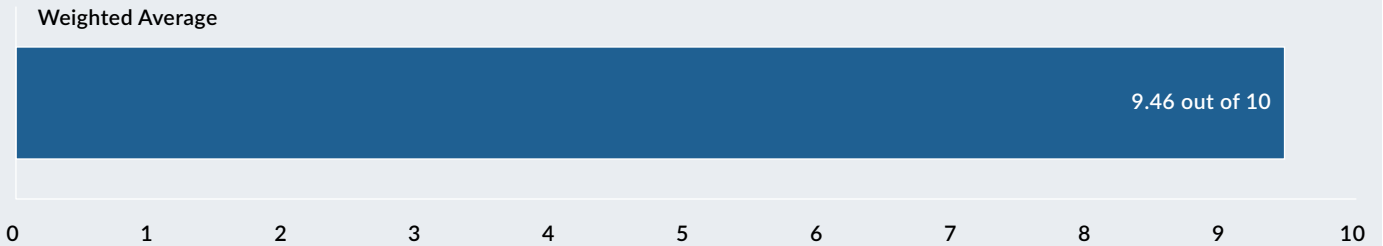


2. COMMUNICATING STRATEGICALLY (CONT.)

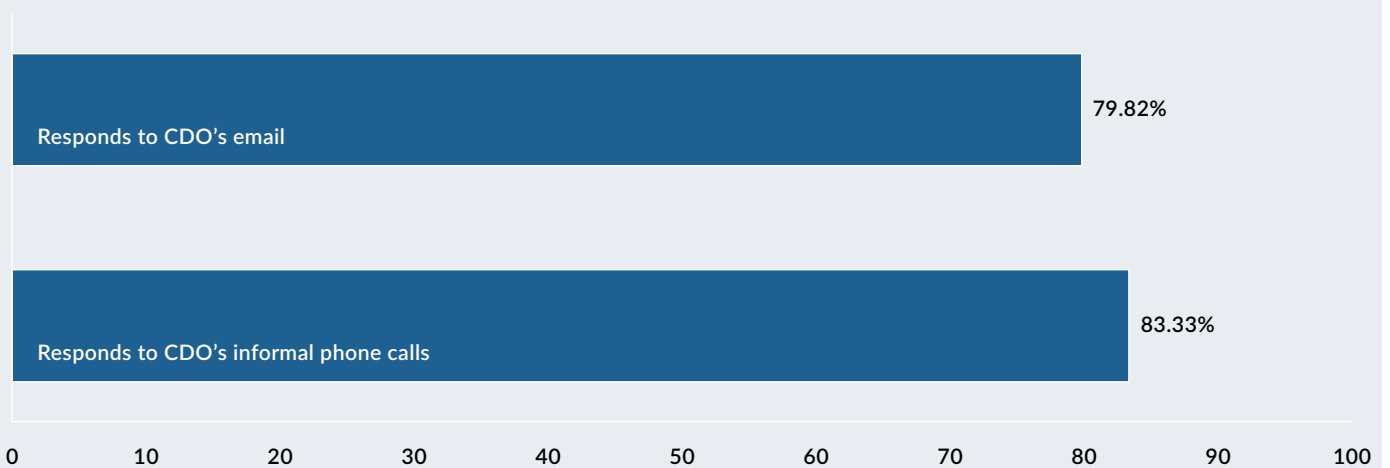
By the Numbers (cont.)

One aspect of communicating strategically is to use the CEO's time wisely. Data shows CDOs recognize the importance of maximizing time with the CEO, when asked to rate the importance of using their CEO's time efficiently.

2.03: Importance of using CEO's time efficiently, rated by CDO



2.04: CEO's responsiveness to means of communication



2.05: CEO's preferred method for informal communication

43.33%	Face-to-face
32.50%	Email
8.33%	Text
6.67%	Phone call
5.83%	Unknown
3.33%	Other

3. DISTINGUISHING BETWEEN DISAGREEMENT AND ARGUMENT

Honest, transparent, and respectful communication is important when voicing a difference of opinion in professional relationships. The CDOs and CEOs who were interviewed all expected there would, at times, be disagreements—they looked at this as healthy. However, they also were firm in stating that while it is acceptable to voice a differing opinion, once a decision is made, both the CDO and CEO should be supportive for the good of the organization.

In successful relationships, CDOs recognize that they have an obligation to bring their expertise to the table. It is essential that CDOs express their opinions and reasons for them, even if the CDO feels disagreement might be in vain. As a member of the executive team, the CDO provides information the CEO relies on, even if the ultimate decision must be contradictory. Many factors contribute to a decision,

and it is the CDO's responsibility to supply information related to key philanthropic stakeholders and community perspectives that nobody else in the executive suite can provide.

Sometimes the CDO and CEO can have a problematic relationship that goes deeper than merely a difference of opinion. Again, open and honest communication can be the best way to begin the process of repairing a troubled relationship. Sometimes the disagreement is a matter of perspective. Where one person might have a problem or issue with the way things are being handled, the other person might not see it as a problem at all. Airing differences in an open and respectful manner can help improve the situation.

From the Transcripts

"It's a good relationship. We can agree to disagree."

—Chief Executive Officer

"At the end of the day, he [CEO] is the boss and he makes the final decision..."

—Chief Development Officer

"My advice would be to have the courage to have the critical conversation to understand why this is not working well, and in that conversation, have the courage to articulate what you need as well. By identifying the issues, you can actually work on a solution."

—Chief Development Officer

"You've got to find that common ground. There are certainly days where we don't agree on certain things. I think that actually comes down to process. We're different people and we may do things differently, and that's okay."

—Chief Development Officer

By the Numbers

The survey shows that CEOs—as observed by CDOs—do a strong job of listening to the opinions of CDOs and accepting feedback from CDOs regarding fundraising topics. Improvement can be made, however, in other areas.

2.06: CEO behaviors	% of CDOs who reported their CEO doing this
Invites CDO's participation in strategic/operational meetings	69.30%
Requests CDO's opinions	68.42%
Listens to CDO's opinions	78.95%
Asks questions when they don't understand something relating to philanthropy	64.04%
Acknowledges their own shortcomings relating to philanthropy	52.63%
Accepts CDO's feedback on fundraising topics	85.96%

KEY III. PROFESSIONAL CONFIDENCE WITH PERSONAL HUMILITY

When CDOs and CEOs are asked about the personal and professional habits that make working relationships successful, two prevalent themes are confidence and humility—particularly relating to CDOs' ownership of the culture of philanthropy among executive suite colleagues. These qualities can be broken down into three primary categories:

1. MUTUAL RESPECT AMONG ALL MEMBERS OF THE EXECUTIVE SUITE

Those CDOs who gave their executive suite relationships a high rating describe strong working relationships not only with their CEOs, but with CFOs, COOs, CMOs, CNOs, and others*. This falls under the category of professional confidence and personal humility because the notion of teamwork and collaboration are essential to the fulfillment of both. Evidence of this quality includes CDOs listening to and assisting their colleagues, providing knowledge as a relationship expert, and utilizing their seat at the table to present a community perspective.

2. CDOS PRESENTING/VIEWING THEMSELVES AS VALUE-ADDED

Professional confidence is built on a foundation of understanding the worth of fundraising and development professionals in advancing the organizational mission. This quality also includes possessing a thorough understanding of all of the skills that the CDO brings to the table. Many CDOs have backgrounds in other industries, and can provide insights from multiple professional perspectives. Evidence of this quality includes recognizing and offering areas of expertise, presenting the impact and benefits of philanthropy, and having the metrics to back up these positions.

3. CDOS APPROACHING ROLE WITH HUMILITY

This trait is often defined by situations in which it is lacking. CDOs who struggle to have success in the executive suite may be viewed as failing to compromise, listen and learn, or work as part of a team. Conversely, evidence of this quality includes willingness to learn from other executive suite team members, board members, and others; choosing their battles in conversations with CEOs; and overcoming misconceptions other executive suite members may have about development without being personally offended by them.

1. MUTUAL RESPECT AMONG ALL MEMBERS OF THE EXECUTIVE SUITE

A highly effective executive suite is collaborative, communicative, and mutually respectful. Notably, both CDOs and CEOs mention the importance of mutual respect among all members of the executive suite as essential to the success of the organization's culture of philanthropy. It is incumbent upon all members of the executive suite, not just the CDO or CEO, to ensure mutual respect and collaboration in service of the organization's goals. Considering the value of all organizational stakeholders in participating in referral-based medical philanthropy, the CDO must be effective in enlisting the buy-in of each so that philanthropy can become a strategic priority throughout the organization. Specifically, as gift sizes increase, a CFO often must be involved in discussions of structuring. As the culture of philanthropy spreads organization-wide, the CMO and CNO must have influence in that strategy. In organizations with a COO, sometimes the CDO and COO work together more frequently than the CDO and CEO. All must work together toward a common goal, understanding and respecting how each executive's purview functions in relationship to the goal, and be willing to assist wherever possible.

Similarly, each member of the executive suite has an area of ownership that the CDO can seek to augment via any assistance possible. This may be through philanthropy, through advice as a relationship expert, or as a voice that carries the community perspective. Because CDOs are frequently out in the community, they are able to gauge the mood and opinions of organizational stakeholders and bring those perspectives into play at the executive level. CDOs are also highly skilled in working with people, resolving conflicts, overcoming roadblocks, and strategically approaching relationships.

**For the purposes of this report, the following titles are reflected by these acronyms: chief financial officer (CFO), chief operating officer (COO), chief information officer (CIO), chief medical officer (CMO), chief nursing officer (CNO), and chief experience officer (CXO).*

1. MUTUAL RESPECT AMONG ALL MEMBERS OF THE EXECUTIVE SUITE

From the Transcripts

“My CEO was out of town and I asked the chief medical officer to sit in a [donor] meeting. After we closed the gift, he called the CEO up and said, ‘My God, that guy does know what he’s doing.’ And our whole dynamic changed after that.”

—Chief Development Officer

“If you’re at an institution where you’re trying to develop the culture of philanthropy system-wide, it’s critical to have the people at the very top of the leadership structure fully engaged. The old adage is, the tone is set at the top. When it comes to philanthropy, it absolutely couldn’t be more true.”

—Chief Development Officer

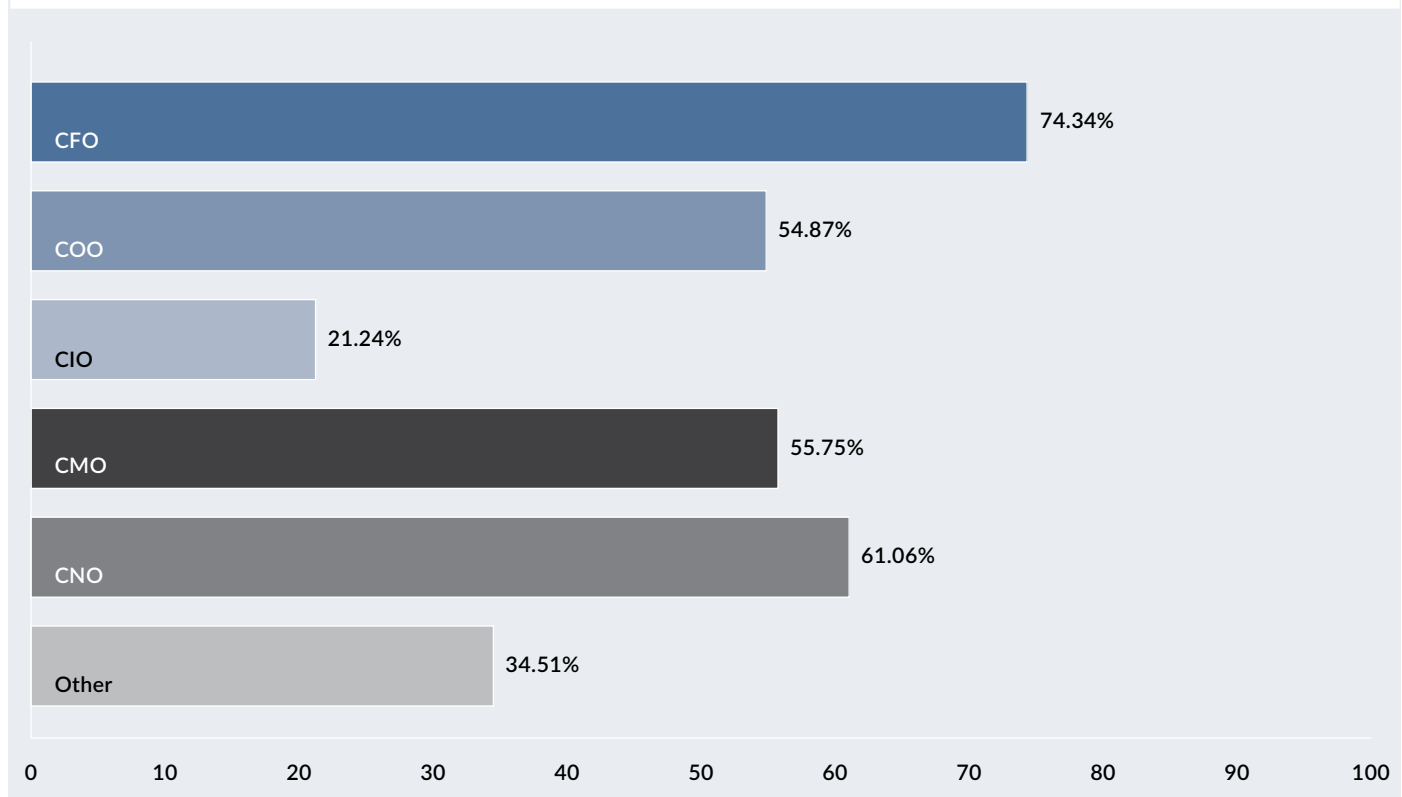
“We as philanthropy people, we want the ops team to have skin in our game, but we’re not willing to have skin in their game.”

—Chief Development Officer

By the Numbers

When asked which executive suite relationships besides the CEO were important to the success of their work, more than three-quarters of respondents named the CFO. More than half named CNO, CMO, and COO.

3.00: Other executive suite relationships important for success in healthcare philanthropy

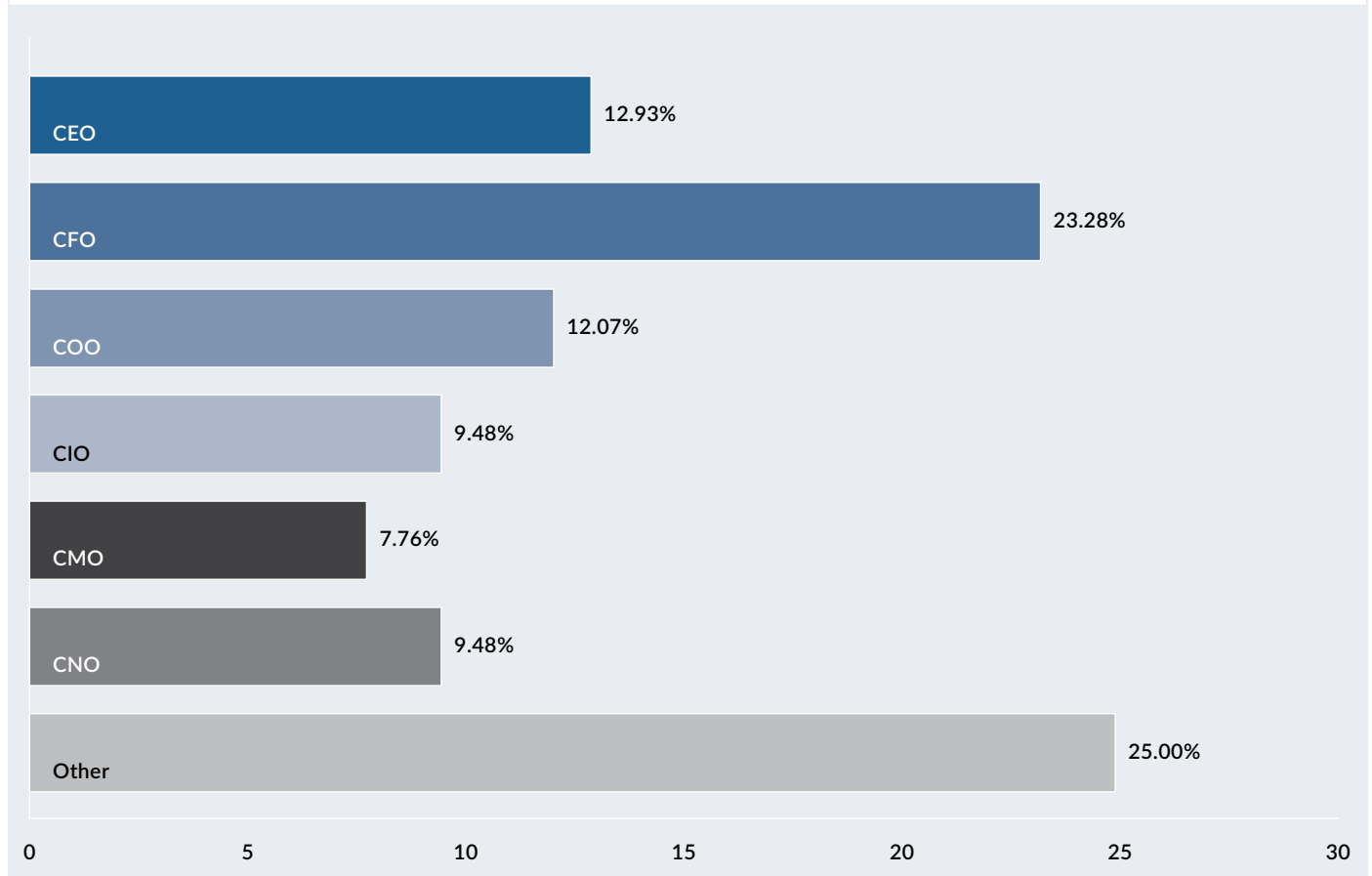


1. MUTUAL RESPECT AMONG ALL MEMBERS OF THE EXECUTIVE SUITE (CONT.)

By the Numbers (cont.)

When asked what executive suite relationships CDOs found most challenging, the CFO was also named by the greatest number. ("Other" responses included all executives, no executives, marketing executives, and legal counsel.)

3.01: CDO's most challenging executive suite relationships



Survey respondents gave reasons for these challenges, which can be broken down as follows:

3.02: Reason for challenging relationship

49.02%	Attitudinal	(Negativity or indifference to philanthropy)
20.59%	Logistical	(Obstacles of time, organizational structure, and access)
12.75%	Behavioral	(Problematic behaviors, often related to communication)
9.80%	Personal	(Clashing personalities or other unique circumstances)
5.88%	Uncategorized	(No challenges)
1.96%	Philosophical	(Opposing approaches to work and philanthropy)

2. CDOS PRESENTING/VIEWING THEMSELVES AS VALUE-ADDED

Encompassed in the theme of professional confidence is the notion of a CDO taking steps to present his or her role as value-added among an executive suite that may have pre-existing negative biases. As a role that is growing in importance as healthcare organizations rely more heavily on philanthropy, CDOs must take steps to overcome the resistance that may impede effectiveness. CDOs also pointed out that achieving high numbers, meeting goals, and exceeding expectations are natural ways to present the value that development adds—but equally important is ensuring that the executive suite as a whole is aware of the strategy, science, and data behind what development does.

CDOs are able to offer expertise in the areas of community advocacy, strategic relationship building, and crafting and sharing an inspiring vision. Spending a large amount of

time in front of donors, CDOs are intimately familiar with what is inspiring to donors. As a healthcare organization crafts its strategic vision, a CDO adds tremendous value by expressing the perspectives of supporters, perhaps conducting feasibility studies in order to determine whether that direction is fundable, and anticipating the role that philanthropy may be able to play in fulfilling the goal. CDOs with high confidence in these skills described themselves as having a seat at the table for important discussions with their CEOs. Meanwhile, CDOs who believed themselves to be primarily useful to the organization as a fundraiser and found their knowledge of operations unimportant were unlikely to be included in most executive suite meetings.

From the Transcripts

“The best relationship has been with the chief development officer who feels comfortable asserting himself and making the best use of my time on behalf of the organization and on behalf of the development function.”

—Chief Executive Officer

“If we don’t have a voice in the biggest strategic discussions of a system or of an institution, that’s a red flag right away. You’ve got to build up your credibility as the CDO so when you speak, you’re offering value.”

—Chief Development Officer

“I think there is already that negative bias, and I think it is important for us to communicate the sophistication and intellectual components of what we do.”

—Chief Development Officer

“Mediocrity is not an option. You have to perform with excellence. If you’re not performing that way, they’re not going to get the respect of the CEO, period.”

—Chief Development Officer

“It’s important for us to demonstrate the really thoughtful, very business-focused work that we do. If we don’t communicate that well, it’s our own fault.”

—Chief Development Officer

2. CDOS PRESENTING/VIEWING THEMSELVES AS VALUE-ADDED (CONT.)

By the Numbers

When asked to rate their confidence in contributing to executive suite conversations related to fundraising, CDOs scored on average **8.43 out of 10**. When asked to rate their confidence in contributing to executive suite conversations related to non-fundraising topics, however, the average score was **7.89**. This reduction is even more significant when weighted against the success of their CEO relationships, as shown in the chart below.

3.03: CDO's confidence in contributing to executive suite conversations separated by CDO-CEO relationship score

Relationship Rating	Negative (1-3)	Neutral (4-7)	Positive (8-10)
Fundraising Topics	7.00	7.64	8.70
Non-Fundraising Topics	6.20	6.91	8.22



3. CDOS APPROACHING ROLE WITH HUMILITY

While CEOs comment on the necessity of a CDO who recognizes and embraces an active role in areas such as relationship expertise, community relations, and cultural change, they also mention an important distinction between confident professionalism and willingness to work as part of a team. In this report, this quality is referred to as “personal humility,” and it relates to the ability to approach conversations from a place of willingness to listen, learn, and adapt. Frequently, CEOs described a lack of humility as one of the most fatal mistakes a CDO can make, in terms of the success of executive suite engagement. Some CDOs perceive a lack of respect for the philanthropy arm, resulting in overcompensation that can be interpreted as egotism.

CDOs also frequently mentioned the importance of deferring to the CEO as differences in opinion arise and showing respect for the CEO’s leadership at all turns. This means respecting the other executives the CEO has put in place, recognizing the many other pressures the CEO faces, and accepting that the CDO’s role is in support of the activities of the healthcare organization, which is run by the CEO.

Another important issue under this category is that of public image. As one of the most visible members of the executive suite and one who is highly recognizable in the community, CDOs are also responsible for promoting the leadership and recognition of the CEO in the eyes of donors.

From the Transcripts

“I had a Chief Development Officer who was determined that he had the answer to everything. He was not collaborative with me, he was not collaborative with board members, he was not collaborative with donors. He always thought he knew best.”

—Chief Executive Officer

“You’ve got to be open, you’ve got to be mold-able, you’ve got to be mentoring, you’ve got to be understanding. And if your ego gets in the way of that, then you’re going to butt heads with your CEO from the very beginning, and you’ll never be able to recover from it.”

—Chief Development Officer

“You are constantly wanting to promote [the CEO’s] position...so they don’t ever feel like you know people or are doing things out in the community that they aren’t a part of.”

—Chief Development Officer



3. CDOS APPROACHING ROLE WITH HUMILITY (CONT.)

By the Numbers

In interviews, more than three-quarters of all participants organically mentioned the importance of mutual executive suite respect. More than two-thirds of participants also described the importance of CDOs presenting their roles as value-added and approaching their own roles with humility and willingness to work as part of a team.

Regarding the importance of deferring to a CEO's leadership, interview respondents mentioned the professional conflicts that may arise and be overcome in situations in which the CDO was not hired by the CEO. These situations are not infrequent; survey respondents also showed that, while most report to the organizational CEO, a smaller percentage were hired by the CEO. This circumstance provides an opportunity to demonstrate deference and humility that may bolster a working relationship.

3.04: To whom the CDO reports

Hospital/System CEO	61.54%
Foundation CEO	7.69%
Foundation Board	11.54%
Other	19.23%

3.05: Who hired the CDO for his/her current position

Hospital/System CEO	55.38%
Foundation CEO	10.00%
Foundation Board	10.77%
Other	23.85%



KEY IV. TRUST-BASED ENGAGEMENT

While study participants were specifically asked to rate their working relationships based on the degree of trust and importance of trust, participants described honesty and respect as equal to trust in importance for successful executive suite relationships. This triad of qualities has been called “Trust-based Engagement” and has been analyzed as follows:

1. HONESTY

As CDOs carry on important relationships internally and externally, their CEOs appreciate and value a policy of “no surprises.” This means recognizing what information might be useful for a CEO to know, particularly pertaining to community and donor interactions, philanthropic contributions, clinician engagement, conflicts, or conversations that directly impact the CEO’s overall strategy. This quality also involves presenting honest opinions to the CEO in donor situations so that the CEO has the benefit of the CDO’s experience and advice. Being proactive to share important information is foundational to a strong executive suite relationship.

2. TRUST

This quality can be defined as the presence of certain cooperative behaviors in an executive suite relationship that indicate both the CDO and CEO depend on the other and feel confident entrusting each other with tasks in certain situations. A trademark of strong collaboration, this quality involves mutual valuation of philanthropy as a strategic priority, which is explored elsewhere in this study. This section defines how trust manifests in the executive suite by rating key behaviors.

3. RESPECT

In this study, the term respect refers to working relationships featuring mutual positive regard. In other words, while the two may disagree at times and while conflicts may arise, the CDOs who rate their relationships highest are committed to working through these disagreements with their CEO, supporting their CEO in achieving the vision for the organization, and recognizing the authority the CEO has over the operations and strategic direction of the organization.

1. HONESTY

CDOs successful in their working relationships are always cognizant of the fact that even very experienced CEOs do not spend the majority of their time in the fundraising space and, as a result, may not have the knowledge or facts needed to be successful in all situations. For that reason, CDOs must be proactive about being honest in their CEO relationships in order for them to be successful. Two primary tasks are involved in this effort: identifying the information that is essential for the CEO to know, and determining how and when to share that information so that the CEO can derive maximum benefit from it.

Study participants describe the importance of sharing information with CEOs in any situation where a donor may expect the CEO to know something. Prior to any donor meetings in which a CEO will be involved, including events at which a donor and CEO will be present, a CDO should share the pertinent information from any conversations the CDO has had with the donor. Sharing the previous contributions the donor has made, if that may be unknown to the CEO, is also important. Other useful information to share with a CEO includes donor opinions related to the strategic

direction of the organization, advice related to how the CEO interacts with donors—particularly in those situations where the CDO suspects a CEO may have committed a faux pas unknowingly—and any current or past problems that may surprise a CEO if they are not shared in advance.

Once a CDO has identified information that is critical to share with the CEO, they must communicate this information in a manner that is consistent with the preferences of the CEO. Other sections of this report provide more details on the specific communication styles that characterize most successful working relationships. However, one point worth noting on the topic of communicating honest feedback is that some information may not be received well, and savvy CDOs are able to determine when their opinions must be presented more sensitively.

1. HONESTY (CONT.)

Reinforcing these effective CDO professional habits, CEOs who were interviewed described a desire for a consistent mechanism whereby their CDOs give them information regarding donor situations. They expressed a desire for no surprises, and also described the importance of making no assumptions about what a CEO may or may not know.

Some CDOs have found difficulty in reconciling their understanding of the organization's strategic priorities to the CEO's. In situations where some discrepancy may exist, it is much better to seek clarification than to proceed with an assumption that may miss the mark.

From the Transcripts

"I think we are both very straight shooters, and if we have something to say, we say it. We are both pretty blunt."

—Chief Development Officer

"I think that development officers can make a mistake by kind of putting their CEO out on a limb somewhere where they didn't expect to be in terms of a potential donor."

—Chief Executive Officer

"Absolutely no surprises for your CEO. I think sometimes, development officers have a tendency to avoid telling the bad news. That is a big mistake. You've got to get out in front of it. If you see the train wreck coming, you've got to let the CEO know. It'll pay off in the long run."

—Chief Development Officer

"I think what happens a lot of times is that we try to make ourselves indispensable by keeping information to ourselves, so nobody else knows what the secret sauce is but us."

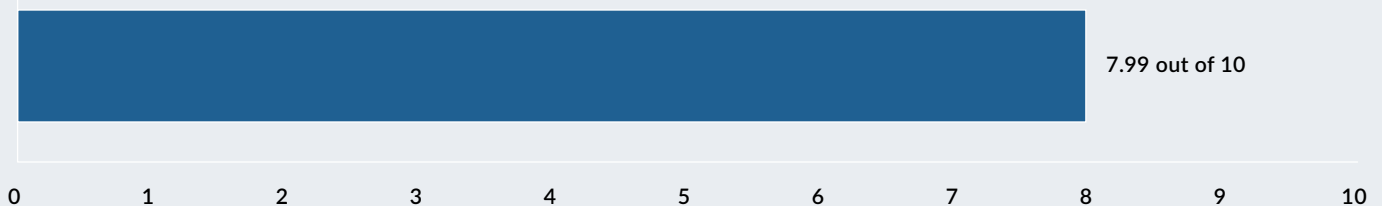
—Chief Development Officer

By the Numbers

While study respondents in general tended to rate themselves highly, one of the lowest aggregate scores was for the overall quality of communications between CDOs and CEOs. This was scored **7.99 out of 10**. Unsatisfactory communications are obstacles that do not necessarily prevent honesty from developing in an executive suite relationship, but do not encourage it.

4.00: CDO-CEO quality of communications

Weighted Average



1. HONESTY (CONT.)

By the Numbers (cont.)

When asked to rate the importance of various relationship qualities in executive suite relationships, survey respondents overwhelmingly indicated that nothing was more important than honesty, with the quality “CDO and CEO are open and transparent with each other, even when it is difficult” rated at **9.5 out of 10**. This was the highest rating of all the qualities rated.

Interview participants also emphasized the importance of honesty and transparency, with **96% of CDOs** and **78% of CEOs** bringing up the topic spontaneously.

4.01: Important qualities of successful relationships	CDO Rating
CDO and CEO are open and transparent with each other, even when it is difficult.	9.50
CDO uses the CEO's time efficiently.	9.46
CDO has a seat at the executive leadership table when institutional strategy is being established.	9.43
CDO understands how philanthropy fits in the larger picture of the organization's operations.	9.42
CDO and CEO have a shared vision of philanthropy for the organization.	9.35
CDO delivers on fundraising goals for the organization.	9.29
CDO meets regularly with the executive leadership team.	9.18
CDO treats building a relationship with the CEO similarly to building a relationship with a donor.	9.12
CEO regularly commits time to fundraising activities.	8.87
CDO leverages relationships with other executive leaders to influence the CEO when necessary.	6.45
CDO and CEO share the same portfolio of donors.	5.95
CDO doesn't express disagreement with CEO in order to reduce potential conflict.	5.02



2. TRUST

All study participants were directly asked how trusting they felt their executive suite relationships were, how they would rate the relationship based on trust, and what behaviors indicated trust. While the importance of trust in a working relationship of any nature is obvious, the behaviors cited to support the notion of trust varied. Those who were dissatisfied with the level of trust and those who were highly satisfied often rated overlapping common behaviors. For example, some CDOs highly satisfied with their working relationships were excluded by their CEO from executive suite strategy conversations. CDOs were equally likely to find this troubling as not. Such a wide range of trust-based behaviors indicates the importance of realistic expectations in establishing trusting relationships in the executive suite.

Additionally, it is often a self-fulfilling prophecy in development that the executive suite as a whole does not respect development as a profession. Those who characterized their relationships as most successful noted a problem newer CDOs sometimes face of feeling the need to compensate for a reputation they perceive that may or may not be accurate. In fact, many challenging behaviors that CDOs believe inhibit their executive relationships may in fact be simply how things are done in this environment, rather than a reflection on themselves or their abilities to engage their CEO.

While most CDOs express that they believe their CEOs trust them, they also rated specific behaviors their CEO displays to demonstrate trust as being lower on a scale of 1-10 than the overall ratings they provided. These CEO behaviors that rated significantly lower included:

- Invites CDO's participation in operational/strategic meetings
- Requests CDO's opinions
- Listens to CDO's opinions
- Assigns important tasks to CDO
- Asks questions when they don't understand something relating to philanthropy
- Acknowledges their own shortcomings relating to philanthropy

In other words, even when trust exists in these relationships, it may be unrealistic to expect a CEO to demonstrate behaviors that typically signify trust. Instead, a relationship in which a great deal of trust is present is more likely to include CEO behaviors such as:

- Accepts CDO's feedback on fundraising topics
- Participates in donor meetings when asked
- Responds to CDO's informal phone calls

A more detailed outline of the ratings for all behaviors appears on page 31, graphic 4.03.

From the Transcripts

"I was always worried about how we would handle things, how he would handle things independently. I actually found myself doing more of the frontline work because I couldn't trust him to be alone with important donors."

—Chief Executive Officer

"I think in our first year together, because she [CEO] is such a strong person, and has such a strong style, I was afraid to show any weakness, so I was not very good about admitting when I should have [done something differently]. I was a little bit defensive, and very justifying why this is right, and why this is right. As our trust in one another has grown, we're both now very comfortable saying, 'That was a bad idea.'"

—Chief Development Officer

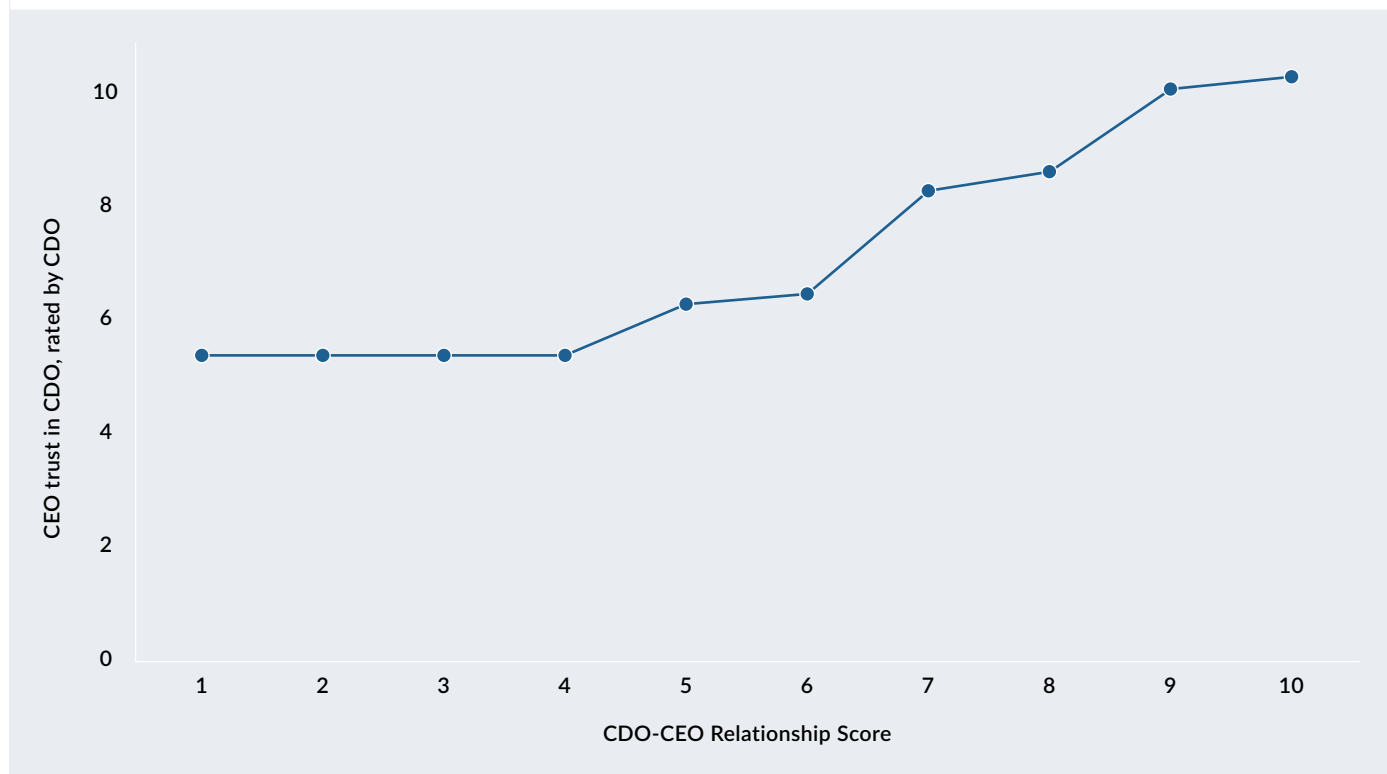
2. TRUST (CONT.)

By the Numbers

Survey respondents rated the degree their CEO trusts them as **8.72**, on average, compared with a success rating overall in their relationships of **8.41**. A comparison between ratings of trust versus ratings of success appears in the table below.

The correlation here is highly logical, reinforcing the importance of acting in a manner that builds trust.

4.02: CEO trust in CDO compared with CDO-CEO relationship score



2. TRUST (CONT.)

By the Numbers (cont.)

Survey respondents rated the behaviors in the table below, which were identified in qualitative interviews with CDOs, by frequency of display by their CEOs. An important distinction in these behaviors is the difference between proactive invitation and passive acceptance. Many behaviors that indicate the onus of action is on the CEO (beginning with action verbs like “Assigns,” “Introduces,” or “Asks”) are rated significantly lower than those that place the onus of action on the CDO (beginning with passive verbs like “Accepts” and “Listens”). An important takeaway for CDOs

is to be proactive in promoting a trust-based relationship by putting forward behaviors that build trust. Examples of recommended behaviors appear in the Recommendations Based on the Five Keys section of the report.

Among the interviewees, **91% of CDOs** and **78% of CEOs** spontaneously brought up trust (before being asked directly) as essential to their executive suite relationships. After being asked directly, 100% of CDOs and 100% of CEOs confirmed the importance of trust.

4.03: CEO behaviors	% of CDOs reported
Responds to CDO's informal phone calls	83.33%
Participates in donor meetings when asked	87.72%
Invites CDO's participation in strategic/operational meetings	69.30%
Requests CDO's opinion	68.42%
Listens to CDO's opinion	78.95%
Responds to CDO's email	79.82%
Accepts CDO's feedback on fundraising topics	85.96%
Assigns important tasks to CDO	62.28%
Introduces CDO to VIPs	49.12%
Asks questions when they don't understand something relating to philanthropy	64.04%
Acknowledges their own shortcomings relating to philanthropy	52.63%



3. RESPECT

Study participants who described their executive suite relationships as generally pleasant, amicable, and productive were likely to perceive their CEO's respect for them as high, and were also likely to represent their own respect for their CEO as very high. The quality of respect involves an intentional effort to get along well, defer to authority during disagreements, and buy in to the CEO's vision.

Among survey respondents, the average score for the level of respect CDOs have for their CEOs was actually higher than the average score for working relationship success—as

was the average score for the respect CDOs felt their CEOs had for them. This suggests that CDOs often feel respectful toward and respected by their CEOs—but respect alone does not necessarily make a working relationship more likely to succeed without other trust-building actions.

Common obstacles related to respect included feeling that development as a profession was not respected, approaching the task of educating the CEO on his or her role in fundraising, and the natural skepticism that can occur in new working relationships.

From the Transcripts

“She [CEO] is always fair. She’s always willing to at least hear me out and there’s respect there. But ultimately at the end of the day, she’s the boss.”

—Chief Development Officer

“Treat the CEO with the utmost respect. Do what you say you’re going to do.”

—Chief Development Officer

“We’ve worked together long enough that there’s respect. There’s pretty significant mutual respect. We have a very pleasant relationship, on a professional level.”

—Chief Development Officer

“You may not always agree on the topic and that’s okay, as long as you remember that the CEO has the final say and then you are a united front.”

—Chief Development Officer

By the Numbers

Three quarters of CDOs interviewed spontaneously described the importance of respect when discussing their working relationships.

Survey respondents tended to rate their own respect for the CEO slightly higher, and their CEO's respect for them slightly lower, than the rating for the success of the working relationship.

4.04: The importance of respect in CDO-CEO relationships	CDO Rating
The success of the working relationship between CDO and CEO	8.41
CDO's level of respect for CEO	8.96
CDO's perception of the level of respect the CEO has in return	8.56

KEY V. STRATEGIC RELATIONSHIP CULTIVATION

A distinct pattern emerged in study data that many of the CDOs who reported strong and successful relationships with their CEOs mentioned that they often view their CEOs as “internal donors.” This is an intelligent and logical application of the skills and talents that are cultivated through a career in fundraising. Extrapolating this concept of viewing the CEO as an “internal donor” and reviewing the data through that filter, we uncovered that this approach is a core theme for strong working relationships due to its proliferation of unprompted appearances in various discussions, as well as its potential value to CDOs who don’t currently have this mindset.

Even for those who find it natural to view CEOs as “internal donors,” there is considerable upside to fully articulating and capitalizing upon this idea in order to develop even deeper CDO-CEO bonds and promote tighter synergy between development departments and the operational management of healthcare organizations. This topic breaks down into three subcategories:

1. SEEING THE CEO AS AN “INTERNAL DONOR”

This concept is the heart of Strategic Relationship Cultivation and the most productive approach a CDO can take towards building, cultivating, and enriching relationships to produce executive suite engagement. It involves adjusting expectations, planning a strategy, and investing time in the relationships.

2. ADOPTING A STRATEGIC APPROACH TO ENGAGING THE CEO

It is often necessary and beneficial for a CDO to educate their CEO about philanthropic concerns—from the basics of how long it can take to cultivate a major gift up through the advanced psychological nuances of effective stewardship and, in particular, when and where some direct involvement from the CEO can dramatically enhance donor relationships. Because the CEO can greatly impact the overall success of fundraising at an organization, CDOs should approach this area with a strategic plan.

3. EMOTIONAL INTELLIGENCE SKILLS AND RELATIONSHIP EXPERTISE

CDOs are leaders in an industry known for cultivating emotional intelligence, as demonstrated by listening skills, picking up cues from body language, and producing true creative empathy. These skills can be applied in CDO-CEO relationships in order to build strong working rapport that can be leveraged to produce effective philanthropic engagement in the executive suite.

1. SEEING THE CEO AS AN “INTERNAL DONOR”

A donor-centric mentality is at the core of all progressive fundraising techniques. All development professionals working in, or learning about, fundraising during our current time frame have developed and worked on a set of interpersonal skills and communications techniques that are donor-centric and honed perfectly towards maximizing relationship cultivation between a potential donor and an organization through matching their passions with the philanthropic goals and aims of nonprofit organizations.

If one has the talent and ability to secure gifts through these interpersonal skills, then one should also be able to forge good working relationships with executive management through reapplying the skills and abilities they have spent a career honing.

Study respondents described their relationships with CEOs as requiring careful attention to personality, communication preferences, existing knowledge and commitment level, personal and professional experiences and passions, and then purposing this information to create a strategy for increasing engagement.

1. SEEING THE CEO AS AN “INTERNAL DONOR” (CONT.)

From the Transcripts

“You have to build trusting relationships internally. They don’t just automatically happen.”

–Chief Development Officer

“If you can get along with your donor, you can get along with your boss.”

–Chief Development Officer

“You know, in my mind, if you’re in a CDO position, you have got the skills of stewardship and prospecting and all of that. Treat the CEO, especially as you’re coming in to a new job, as a prospect. Do your research on him, understand what motivates him, figure out who his major influences are.”

–Chief Development Officer

“I have two strategic plans. I have the strategic plan for the foundation that works with donors, and I have a strategic plan for inside the system, and inside the hospital, for each ops team and ops team member, and what I want to accomplish with them throughout the next year, and set specific goals for that. You ask me, “How do you know that?” It’s because you sit back and you think about the relationship, and how to enhance the relationship, just like you do the donor relationship.”

–Chief Development Officer

“Just like you do with donors, you have to work with your CEO. You have to understand and be a leader yourself, and understand that sometimes you open your mouth and push back, and sometimes you keep your mouth shut.”

–Chief Development Officer

“You have to find some kind of rapport that you can build on, whether it’s going out and having a conversation over dinner and getting to know the person. Getting to know what drives them and what motivates them and what they’re passionate about.”

–Chief Development Officer

By the Numbers

A majority of CDOs still maintain a robust portfolio of donors. CDOs both cherish their existing donor relationships and are staying current in the skill set required to maintain them, making it natural to apply the same skills with their CEOs.

5.00: Number of donors/prospective donors in CDO portfolio

1.67%	None
6.67%	1 to 5
3.33%	5 to 10
20.83%	10 to 20
67.50%	Over 20

2. ADOPTING A STRATEGIC APPROACH TO ENGAGING THE CEO

In instances where there is a disconnect between CDOs and CEOs, one of the most common sources of frustration are unrealistic expectations that some CEOs hold. There are many areas which are second nature to development professionals that those unfamiliar to the field categorically need education on, as they are simply not intuitive. For instance, CEOs may be surprised to learn how long it can take to secure a major gift commitment, or to understand the deeper reasons donors are motivated to give. CEOs are not necessarily likely to have extensive experience with philanthropy, even if they have been in their position for a long time.

Mutual frustration may ensue when CEOs do not understand these nuances, and the CDO can prevent or remedy this by applying a strategic process for transmitting necessary information about fundraising to the CEO.

Managing up is a sensitive task for many reasons, but it is nonetheless critical that the CDO accepts responsibility for making the realities of fundraising understood in the executive suite so that the organization is best able to optimize its philanthropic opportunities. Those successful in this area maximize their efforts in sharing philanthropy's efficacy, communicating strategically, and improving trust-based engagement, all discussed in other sections of this report. Additional strategies may be found in the "Recommendations" section.

A natural consequence of increased knowledge and familiarity is that development will see an increased presence in the overall healthcare operations of the organization—a worthy goal that will reward a persistent and strategic approach to educating the CEO.

From the Transcripts

"So the first thing you've got to figure out is, "Why?" Is it the difference in styles, is it a different philosophy, is it they don't understand what you do? And then, you develop a strategy from there."

—Chief Development Officer

"You've got to work at that, you've got to include them in solicitations, you've got to give them credit when a gift is closed, you've got to build trust with them, you've got to help recruit good board members around them. "

—Chief Development Officer

"Preparation makes all the difference in terms of how a meeting will go. You're thinking out ahead of time, and you really try to understand where the other person's coming from, and what questions they might ask, and being prepared for that can really make for an outstanding interaction."

—Chief Development Officer

"I think it's taken me time to impart, but now he [my CEO] sees that there is a stewardship process. I just can't bring in a fresh prospect and expect a half a million-dollar gift placed on the table, that there is time that needs to be spent to build up that relationship with somebody."

—Chief Development Officer

"That might be the most important thing: How you successfully or how you unsuccessfully manage expectations around philanthropy. You're a constant teacher, there's constant drip, drip, drip that you never arrive at—here's what we're trying to do."

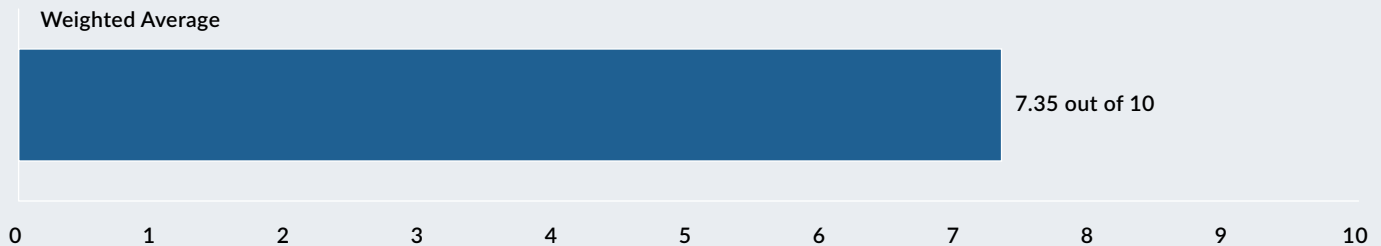
—Chief Development Officer

2. ADOPTING A STRATEGIC APPROACH TO ENGAGING THE CEO

By the Numbers

Interestingly, CDOs rated their CEOs' knowledge about philanthropy at **7.35 out of 10**, but when asked to subsequently rate their CEOs' knowledge of specific philanthropic topics, they rated significantly lower.

5.01: How much CEOs understand about philanthropy



5.02: CEO's knowledge of specific philanthropic topics

CDO Rating

The donor development process	6.44
The amount of time required to secure a major gift	6.03
Major gifts strategy	6.03
Events fundraising strategy	6.11
Annual giving strategy	5.43
Matching philanthropic passions to organizational initiatives	6.67
Fundable priorities	6.78

Healthcare organization CEOs come from a range of backgrounds—making clear the understandable need for philanthropy education.

5.03: CEO background

33.62%	Other (Top answers in this section included CNO and Accountant/CPA)
26.72%	Corporate Executive
23.28%	Public Health Administration
14.66%	Doctor
1.72%	Lawyer

3. EMOTIONAL INTELLIGENCE SKILLS AND RELATIONSHIP EXPERTISE

Development professionals are considered “relationship experts” for a reason. They are adept—often both by nature and as a result of practiced skill—at building close, trust-based relationships with donors. As part of an overall strategic approach to relationship cultivation, the increased development of emotional intelligence and relationship expertise can have a profound effect on the quality of interpersonal relationships with CEOs. Overwhelmingly, CDO study participants described their tactics and actions

in relationships with CEOs in such a way that emphasized their emotional intelligence, adaptability, and reliance upon personal relationship skills, all of which could be leveraged to improve executive suite engagement.

For the purposes of this report, the term emotional intelligence refers to a relatively recent subfield of psychology that seeks to codify and analyze emotional intelligence and interpersonal relationships to enable individuals to cultivate their ability to forge meaningful connections with others.

From the Transcripts

“We are the relationship experts within the hospital. I know we have patient satisfaction, but we, truly, are the ones that have built a career on relationships. So, you need to use those same skills and those same teamwork tactics with the entire ops team.”

—Chief Development Officer

“I think part of it is just getting to know one another. We’re very similar in some ways, we’re also very different in other ways. Our styles are different. So, part of that was just the natural process of getting to know one another.”

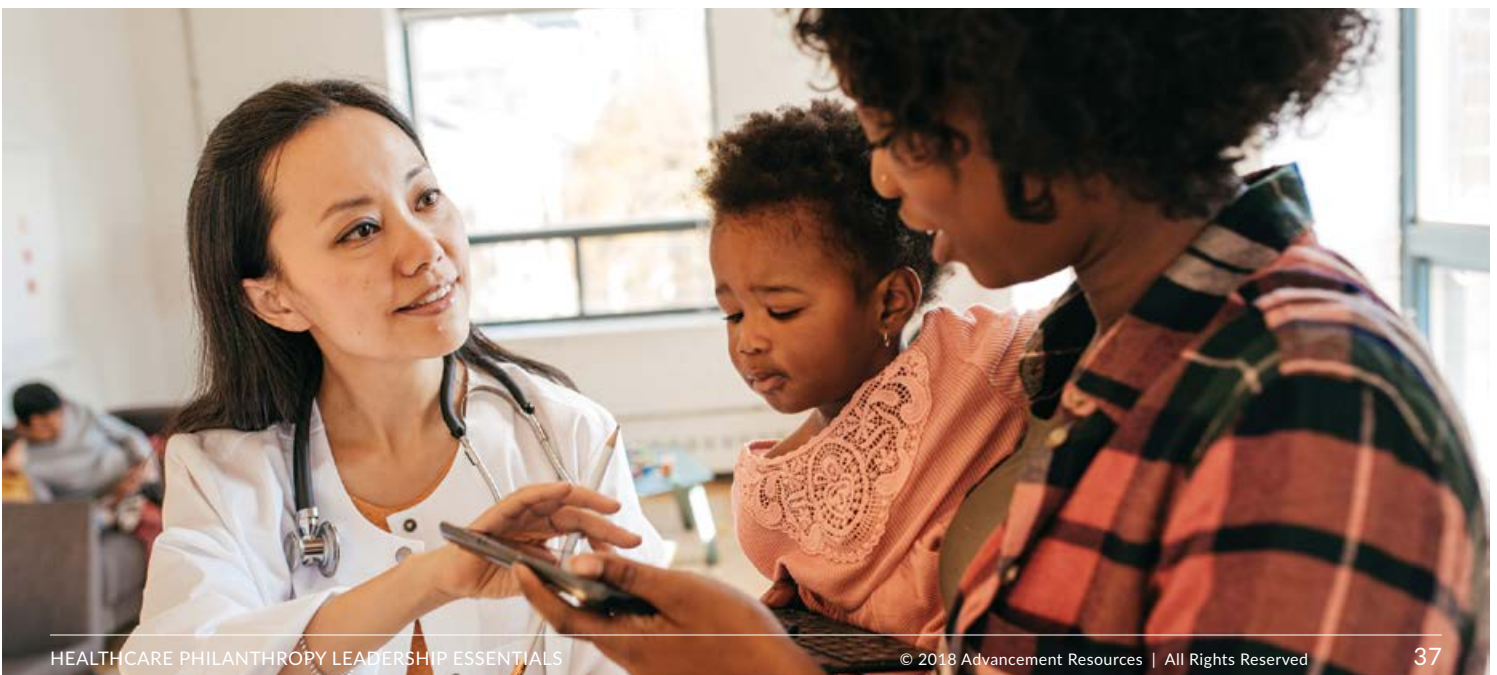
—Chief Development Officer

“Obviously, the people skills of being able to read people and having a certain degree of emotional intelligence is priority number one, two, three, four, five for the chief development officer.”

—Chief Development Officer

“We’re human beings, and we all come from different perspectives, including your CEOs. You must learn what motivates your CEO.”

—Chief Development Officer

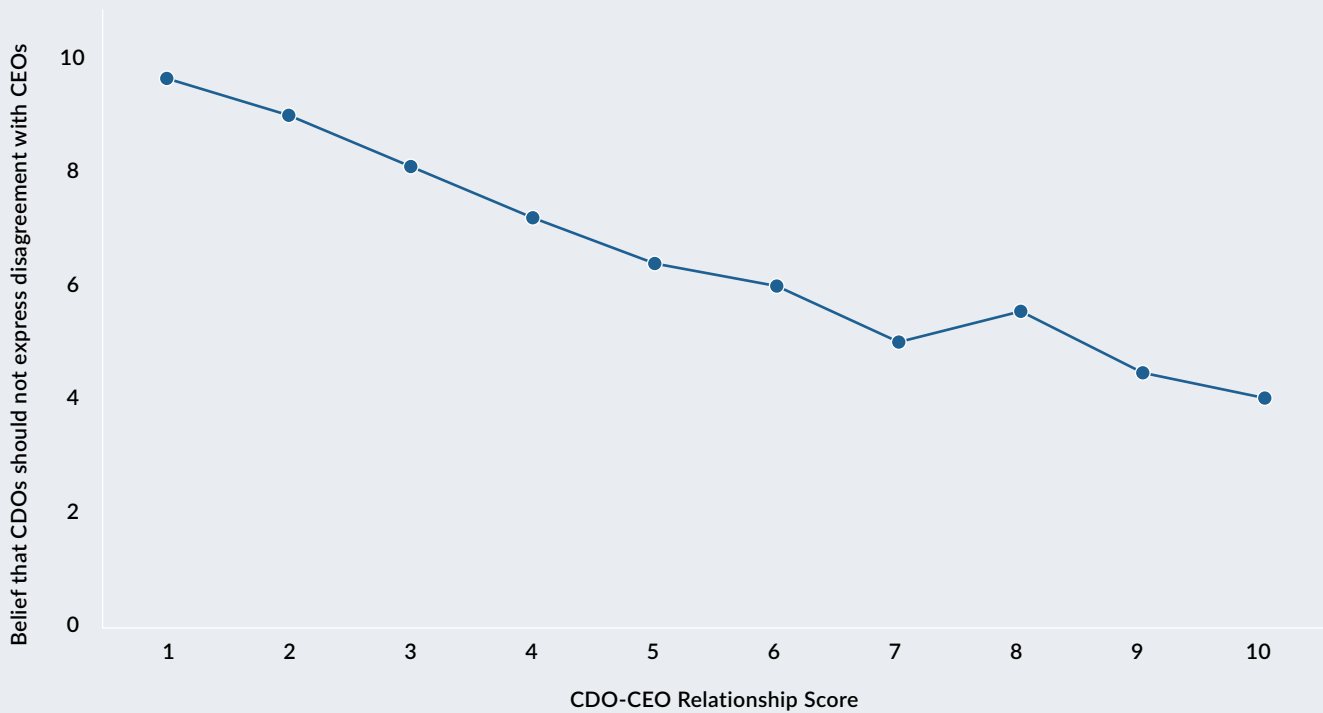


3. EMOTIONAL INTELLIGENCE SKILLS AND RELATIONSHIP EXPERTISE (CONT.)

By the Numbers

This graph shows a correlation between the quality of CDO-CEO relationships with the CDOs' responses when asked how strongly they agree that CDOs should not express disagreement with CEOs. Our data shows a clear link that those with lower scoring CDO-CEO relationships believe that CDOs should not express disagreement with their CEOs. For more information on this data point, see the "Distinguishing Between Disagreement and Argument" section under Key II: Strategic Communication.

5.04: CDO doesn't express disagreement with CEO in order to reduce potential conflict





RECOMMENDATIONS BASED ON THE FIVE KEYS

In order to overcome obstacles and promote effective executive suite engagement in philanthropy, CDOs have experienced success using the strategies described in this section. In order to enable CDOs to troubleshoot their own executive suite relationships, this section is written as a practical guide with questions for reflection, action items, and strategies for positioning the organization to achieve a strong culture of philanthropy with optimal success. Because each section is meant to be explored as needed, there may be information repeated in more than one section. In these instances, reflect on that information through a different lens.



KEY I. SHARED VISION AND OPERATIONAL KNOWLEDGE

1. CEO'S VALUATION AND KNOWLEDGE OF PHILANTHROPY

"He [the CEO] knows about campaigns. We've run several campaigns. He knows the drill. He knows what we do. He knows where his part is. He also encourages participation by all the executives."

—Chief Development Officer

Demonstrate that the fundraising process is strategic.

The first step in building the CEO's valuation of philanthropy is to build his or her knowledge of the overall process. CEOs should understand that the process of inviting a gift is strategic. A better understanding of the overall process can lead to greater appreciation. CEOs often deal in specifics and deliverables. It's important for them to see the philanthropic process as strategic and deliverable rather than amorphous. Even if the CEO has a strong grasp on how philanthropy can benefit the organization, he or she will still appreciate the breakdown of strategy. CDOs should not, however, discount the power of storytelling to illustrate the power of philanthropy. Relating these stories will achieve maximum benefit if the strategy behind the philanthropic success is highlighted or, in the case of a less-than-successful endeavor, how the process could have benefited from strategy.

Questions to consider:

- What is the current CEO's knowledge of philanthropy?
- What myths concerning philanthropy might the CEO currently hold?
- What can the CDO do to debunk these myths?
- How can the CDO structure reports to illustrate the strategic nature of fundraising?
- What types of stories can CDOs share with CEOs that will strengthen their regard for the power of philanthropy? How can strategy be highlighted in these stories? These stories could be positive or negative.



1. CEO'S VALUATION AND KNOWLEDGE OF PHILANTHROPY (CONT.)

Ensure that expectations of philanthropy are realistic.

In interviews, several CDOs expressed frustration when CEOs expected either too much of philanthropy or too little. Demonstrating the strategic nature of fundraising goes hand-in-hand with helping the CEO set realistic expectations. If the CEO thinks of fundraising as amorphous with no set processes or procedures, they might have a tendency to discount the power of philanthropy. CDOs have a professional responsibility to represent philanthropy in a realistic light. CDOs should also weigh carefully how philanthropy can help move toward an institutional goal before making a projection or commitment. If CDOs are working in an environment that discounts philanthropy, they should be willing to start with smaller strategic initiatives and build from there. Just as donors have been known to give small test gifts to see how they will be stewarded, CEOs might do the same with a smaller strategic initiative.

Questions to consider:

- What are the strategic initiatives set forth by the CEO?
- In what ways can philanthropy be used to help achieve these goals?
- Are there any initiatives that would be of interest to donors?
- Can the CDO enlist any members of the executive suite to help show how philanthropy could make an impact on a specific institutional goal?

“While you may be anticipating donor dollars to fulfill this need, do not bank on it because A, philanthropy is lumpy and B, it doesn’t always go where you want it to.”

—Chief Development Officer

Encourage the CEO's participation in the philanthropic process.

One of the best ways to deepen a CEO's appreciation for philanthropy is to involve the CEO through hands-on activities. CEOs have many time constraints, so it is imperative for CDOs to consider the best use of CEOs in the process. In addition to selecting activities and donor relationships with the level of importance that warrants CEO involvement, CDOs also experience success when considering CEO personality type. Where certain activities require the presence of a leader but are not naturally comfortable for the CEO, the CDO should focus on preparing the CEO for success beforehand. CEOs might not be conversant in philanthropy, so CDOs should be prepared to mentor their CEOs through the process. CDOs would be well-advised to thoroughly prepare CEOs, no matter how simple the task seems.

Questions to consider:

- What type of personality does the CEO have? What activities are best suited to the CEO's personality type?
- Will these activities be the best use of the CEO's time?
- Has the CDO fully prepared the CEO for the activity by explaining the strategic reasons behind the activity?
- How can the CEO's involvement be used as a springboard to achieve closer collaboration in setting strategic goals?

2. CDO'S OPERATIONAL KNOWLEDGE OF THE ORGANIZATION

"I think that it's essential that CDOs understand the fundamentals of the business they're in, whatever it is."

—Chief Development Officer

Be strategic about the CDO's role.

Members of the executive suite each have their areas of expertise. CDOs would do well to understand the basics of each area of expertise and be strategic in choosing what else they might need to know. A CDO probably wouldn't be expected to balance the books for the organization, but he or she should have good working knowledge of the strategies employed to keep the organization financially stable and be prepared to assist in implementing these strategies. CDOs should also approach learning about the organization and other executive roles with an open mind and positive attitude.

Questions to consider:

- What are the roles in the executive suite?
- What are the responsibilities of each of these roles?
- How does the strategic plan impact or affect these roles and the areas of the organization they represent?
- How can the CDO and philanthropy assist these roles in executing the strategic plan?

Focus on being part of the team.

A criticism that was shared by both CDOs and CEOs in the interviews was a perception that CDOs desired to be included in executive meetings only because of the benefits for fundraising. While that is an important reason, CDOs experience greater success when they view participation in the executive suite as a collaborative effort in which many disparate parts work toward the ultimate goal of achieving the organization's broader vision. CDOs are skilled in helping donors feel that they belong to a larger group of people doing important work. Bringing these skills into the executive suite can have a positive impact on its overall function in achieving strategic priorities.

Questions to consider:

- What are the issues facing each member of the executive suite? Can philanthropy play a role in solving these issues?
- Does the CDO possess other skills or experiences that would be valuable in assisting fellow members of the executive suite?
- In what ways can the CDO use their skills in relationship building to create a sense of team among the executive suite members?
- What additional responsibilities can the CDO shoulder?
- What can the CDO do to become more visible in the organization with the goal of advancing strategic priorities?



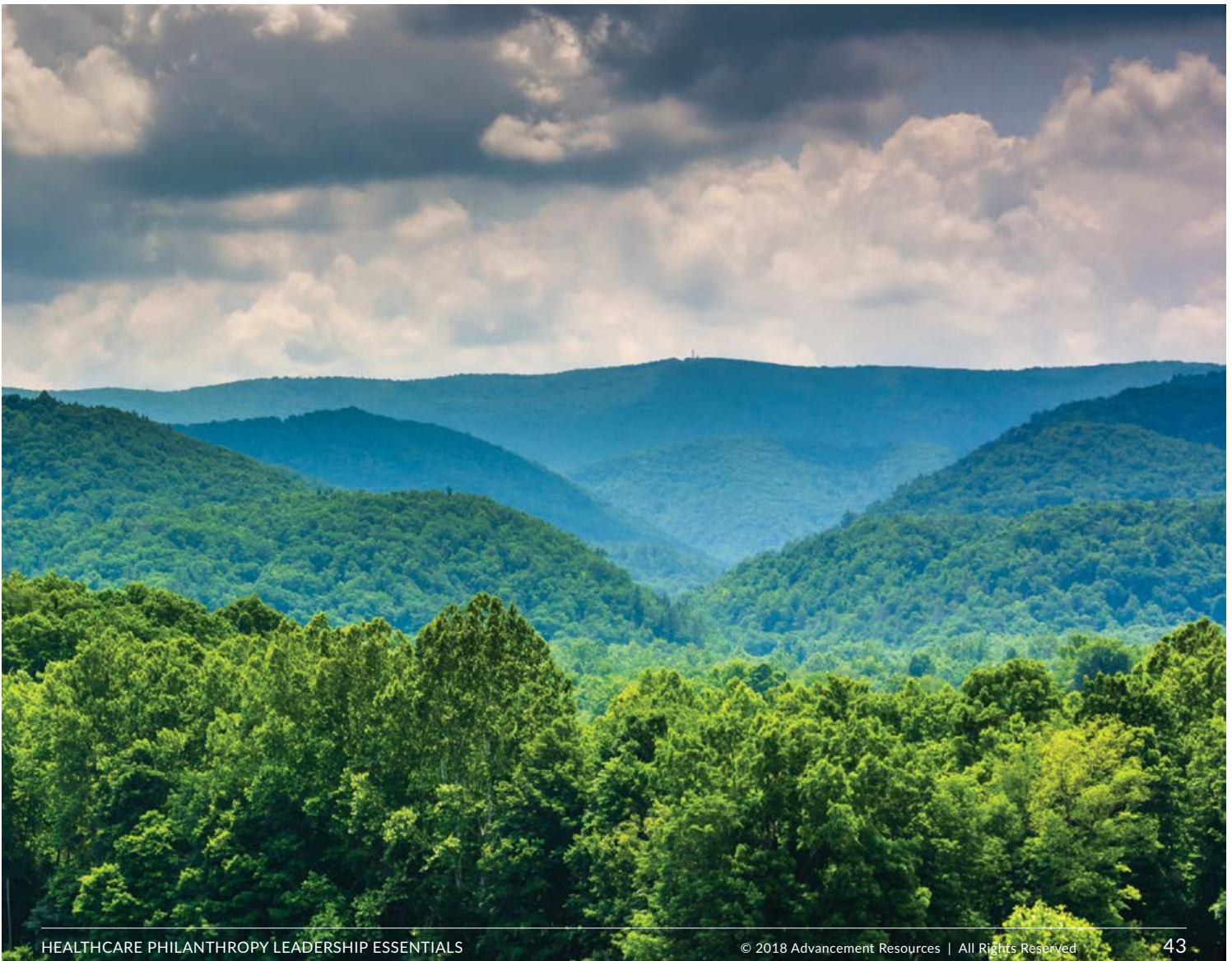
2. CDO'S OPERATIONAL KNOWLEDGE OF THE ORGANIZATION (CONT.)

Actively manage relationships with members of the executive suite.

Working well with other executives can lead to rapport that assists in gaining operational knowledge. CDOs can build credibility by showing they desire to be an active member of the executive suite, discovering the major and minor issues facing fellow executives, and using their skills and position to help advance the organization's priorities. A CDO's role in building the relationship is not to dictate or offer solutions; instead, CDOs should provide and receive ideas and input. If the CDO's relationship with the CEO or other executives started off on the wrong foot, the CDO should have the humility to admit this and do what's necessary to make reparations. Finally, if it seems an executive is resisting the CDO's efforts to create a good working relationship, the CDO should avoid taking this resistance personally, but should remain open to developing a relationship in the future.

Questions to consider:

- In what ways can the CDO work to build relationships with the CEO and other executives?
- Can the CDO schedule time to sit with the CEO and other executives individually to discover their organizational concerns and how philanthropy could alleviate those concerns?
- Does the CDO offer input to the CEO and other executives in a supportive and positive manner?
- Does the CDO take time to know the CEO and other executives on a personal level?



3. CDO AND CEO HAVING SIMILAR IDEAS OF PHILANTHROPY'S ROLE

“It’s so abundantly clear that our model would be fractured without [development] success and support.”

—Chief Executive Officer

Promote the value of philanthropy to the organization.

The optimal working relationship happens when the CDO and CEO share the same view of the value and benefits philanthropy can bring to their organization. Those CDOs who work in a less than optimal situation will do best by working on forming professional relationships with members of the executive suite and, through these relationships, actively demonstrate philanthropy’s power in achieving strategy. The CDO should also always be strategically working to strengthen the CEO’s opinion regarding philanthropy and its value to the organization.

Questions to consider:

- What is the CEO’s current opinion of philanthropy?
- What are some philanthropic activities that the CDO can immediately implement to increase the CEO’s regard for philanthropy? The executive suite’s regard for philanthropy?
- What members of the executive suite will be the CDO’s best allies in demonstrating the power of philanthropy?
- Can the CDO use philanthropy to achieve some small gains among members of the executive suite?
- Once the CDO has achieved a small gain, what is the next logical step in building regard for philanthropy?

Ensure fundraising strategies are aligned with the organization’s strategy.

The best way for CDOs to ensure that they share similar ideas of philanthropy’s role is to make sure the foundation’s fundraising strategies are always tied to or aligned with the organization’s strategy. The CDO should also take all necessary steps to align the foundation’s priorities with the organization’s, including making sure the development staff has a clear picture of how philanthropy will support the organization’s strategic plan. The CDO should not encourage philanthropy that does not support the organization’s priorities.

Questions to consider:

- Does the CDO work with the foundation staff to ensure everyone knows the institutional priorities, especially where they relate to fundraising?
- Is the CDO able to meet with the CEO on a regular basis to update the CEO on fundraising strategies and how they support institutional priorities?
- Does the CDO make an effort to engage the CEO in appropriate fundraising and donor development activities?
- Does the CDO fully prepare the CEO for these activities, including how the activity will help to advance the overall strategic plan?

KEY II. DISCIPLINED ATTENTION TO COMMUNICATION

1. COMMUNICATING REGULARLY

“I think the ground rules of the relationship need to be defined before the chief development officer takes the job in order to be successful. You [as the CEO] have to define what the expectations are of the relationship, the frequency of the interactions, so that ultimately the chief development officer has the access that he or she needs in order to work with the CEO effectively.”

—Chief Executive Officer

Make expectations clear from the outset.

Most CDOs are hired by the CEO or a committee of executives that includes the CEO. It is recommended that expectations concerning communications should be clarified in the interview. If a new CEO is hired during the CDO's tenure, it is advisable for the CDO to meet shortly after the CEO has been hired to set a schedule and best practices regarding communication. The CDO should view these initial meetings as an opportunity to build trust and a means to gain better access to the CEO.

Questions to consider:

- Has the CDO made expectations clear regarding the preferred frequency of communications during the hiring process?
- Has the CDO met with the CEO, especially a newly hired one, to discuss best practices for communication?
- Is the CDO communicating in an open, honest manner from the outset?
- What other things can the CDO do to strengthen communication with the CEO?



1. COMMUNICATING REGULARLY (CONT.)

Set a routine meeting time.

The best recommendation is to have a regularly scheduled meeting. While there is no best frequency for meeting routinely, anywhere between once a month and several times a week is best. The more frequently meetings happen, the shorter they can be.

When a CDO has a regular meeting with the CEO, care should be taken that meetings are productive and an effective use of time. Having a clear agenda, keeping the meeting within the agreed-upon time limits, and reporting on compelling issues and activities will reinforce the working relationship.

Questions to consider:

- What frequency of meetings will be optimal for both the CDO and CEO?
- What can the CDO do to be fully prepared to meet on a regular basis?
- In addition to providing an agenda, what other types of things can the CDO do to effectively maximize the regular meeting time?
- In what ways can the CDO present information in the CEO's "language?"

Form relationships with support staff.

In interviews, CEOs mention the importance of access to administrative assistants. One CEO stated in his interview that he gives the CDO access to his calendar through his administrative assistant to schedule lunches or dinner meetings. The CEO was aware that the CDO and his administrative assistant worked well together and trusted them to schedule his time wisely toward philanthropic efforts. A strong relationship doesn't spring up overnight, but it certainly is a goal to work toward.

Questions to consider:

- In what ways can the CDO strengthen communication through earning trust?
- What actions—such as having access to the CEO's schedule through an assistant—could improve and streamline communication? Can the CDO propose these actions to the CEO?



2. COMMUNICATING STRATEGICALLY

“I gave him [CEO] the book Redefining Healthcare Philanthropy that AHP put out a few years back. He devoured it, and then he said to me, ‘You [as the CDO] might regret that you gave me that book to read because I’ve got all kinds of questions and things that we need to be doing.’ The book gave him some really good insights on what we need to be doing to grow the organization, as far as our philanthropic efforts are concerned.”

—Chief Development Officer

Determine the CEO’s communication style.

CDOs would do well to cultivate their relationship with the CEO just as they would with a donor. Direct questions regarding the CEO’s preferences concerning the manner of communication will eliminate guessing. CDOs should make an effort to find out the communication style most appreciated by their CEO. For example, one CDO explained how she always drew her strategy out on a white board for the CEO.

Questions to consider:

- What is the CEO’s personality style?
- What way does the CEO prefer to communicate?
- Are there alternate methods of communication that would be better used for quick questions or emergencies?
- What type of learner is the CEO?
- How can the CDO craft communication to cater to the CEO’s preferred style?

Maximize opportunities for communication.

CDOs can also improve communication by looking for opportunities to maximize the time they have with CEOs. One CDO reported that whenever she attended an event with the CEO, she offered to drive. She then maximized the travel time spent in the car to prepare the CEO for the meeting and report on other items of importance. If a CDO knows such an opportunity is going to present itself, the CDO should spend some time ahead of this opportunity planning how best to use the time.

Questions to consider:

- Are there pockets of time in the CEO’s schedule that the CDO can maximize for communication?
- What can the CDO do to anticipate the needs of the CEO?
- Based on the CEO’s current environment, what kinds of communications would be welcomed?
- How can information be presented to maximize the CEO’s time?

Another CDO reported that she always tried to know what was on the CEO’s plate so that she could anticipate what the CEO’s day would be like and gauge when certain kinds of information would be best received. The CDO should never withhold important information—good or bad—from the CEO; however, the CDO should think strategically about the best time and place to communicate information.

2. COMMUNICATING STRATEGICALLY (CONT.)

Use opportunities for the CEO to have positive engagement with philanthropy.

Part of communicating strategically involves helping the CEO understand his or her role in fundraising and providing opportunities for him or her to experience “wins.” As one CDO said, “Make your CEO look like a rock star.” Engaging the CEO in those wins has a two-fold purpose: it facilitates an experience of the joy of philanthropy, and it helps the CEO better understand his or her role in it. Part of making the CEO “look like a rock star” involves considering the best ways to involve him or her in working with donors, grateful patients, and physicians or other healthcare professionals. The CDO should strive to clearly articulate the strategic benefit of involving the CEO in the philanthropic efforts of the organization. Being unselfish about sharing in these philanthropic successes will also help to build a stronger CDO-CEO relationship.

Questions to consider:

- Based on the CEO’s personality and skill set, what are some philanthropic activities he or she would enjoy? Are there activities that would provide a “win” for the CEO?
- In what ways can the CDO articulate why the CEO’s involvement in philanthropy is valuable?
- In what ways can the CDO demonstrate the CEO’s value to philanthropy?
- Besides involving the CEO in activities that provide a “win,” what are other ways to make the CEO “look like a rock star?”
- What information does the CEO need to be successful when engaging in philanthropy?



3. DISTINGUISHING BETWEEN ARGUMENT AND DISAGREEMENT

“Be a straight shooter and speak your mind with tact. Be open to hearing the pros and cons from the CEO of whether or not to move forward on a philanthropic program.”

—Chief Development Officer

Communicate transparently.

The best way for CDOs to avoid misunderstandings is to communicate with CEOs in an open and honest manner. CDOs should also strive to maintain a friendly, professional manner and to keep in mind that the CEO is making decisions for the benefit of the organization. Part of a CDO's role in communicating honestly is sharing opinions and ideas, even if they conflict with the CEO's. This means receiving and accepting alternative viewpoints gracefully. CDOs should also consider the appropriate venue for stating an alternate viewpoint. If the CEO is sensitive to being questioned in front of people, it might be more professional for the CDO to approach the CEO in private. Once a decision has been made, the CEO should accept it and move forward.

Questions to consider:

- How can the CDO share opinions in a manner that is open and honest?
- What type of leader is the CEO and how might this affect when and where the CDO shares alternative viewpoints?
- Are both parties moving forward with a decision or unnecessarily hanging on to an opinion or idea?

Hold high standards for communicating.

Arguments can erupt when parties do not disclose all necessary information. One facet of effective communication is ensuring that the CEO is never surprised by information. The CDO should not withhold information, good or bad. A way to eliminate the CEO being caught out of the loop is to have a brief meeting or communication prior to board meetings or engagement with donors. The CDO should also strive to ensure the CEO is informed of developing issues before they turn into emergencies.

Having high standards for communication also includes keeping the organization's best interests at the forefront. Sometimes this involves letting go of an opinion or, as one CEO put it, “Agreeing to disagree.” Being open to all opinions and able to move on from disagreements helps facilitate open and honest communication.

Questions to consider:

- What type of protocol can the CDO put into place for communicating unfavorable news or emergencies?
- How can the CDO ensure the CEO is never surprised?
- Does the CDO accept criticism in an open, positive manner?
- In what ways can the CDO and CEO benefit from having and sharing differing perspectives?

KEY III. PROFESSIONAL CONFIDENCE WITH PERSONAL HUMILITY

1. MUTUAL RESPECT OF ALL MEMBERS OF EXECUTIVE SUITE

“The thing that was most dysfunctional about that relationship was that he was not a team player and therefore people didn't bring ideas to him, didn't bring opportunities to him, wasn't welcomed on my management team meetings, because his influence was not productive, and it's critically important that this individual be well liked and respected by all components of the organization.”

—Chief Executive Officer

Recognize any deficiencies in executive engagement.

The only way to resolve problems is to understand what they are and why they exist. Keeping in mind that the CEO's job is easier when the executive suite is operating as a unit, making an effort in this area will improve the CDO-CEO relationship, as well; CEOs understand that identifying problems is the first step toward solving them. Without taking disagreements personally, CDOs must approach the executive suite with a balanced eye.

CDOs successful in this area have conducted meetings with each member of the executive suite, asking how they might be of use in that area. They have also found greater success in attending all executive team meetings and being fully engaged as a member of the executive suite.

Questions to consider:

- What are the myths that organizational leaders believe that prevent their engagement in philanthropy?
 - What is the evidence that supports their belief in these myths?
 - What can the CDO do to disprove these myths?
- What legitimate objections may other members of the executive suite have to engagement in philanthropy?
 - What can the CDO do that will prove philanthropy's value?
- How can the CDO demonstrate support/interest/engagement in the other areas represented in the executive suite?
- Does the CDO present philanthropy work as strategic?
- Does the CDO defer to other executives' areas of expertise, as appropriate?
- What can the CDO do to offer support to other executives via philanthropy? What intentional steps can the CDO take?



1. MUTUAL RESPECT OF ALL MEMBERS OF EXECUTIVE SUITE (CONT.)

Utilize active listening skills.

CDOs who leverage their strong fundraising skills as professional listeners find great success in earning their colleagues' respect and demonstrating mutual respect. Drawing from other skill areas detailed in this report, CDOs describe the importance of learning what their colleagues are hoping to achieve and how philanthropy can support those goals, and absorbing operational knowledge that may also improve their ability to share useful information with donors.

CDOs have an advantage over many of their colleagues in that working with donors has prepared them to listen differently, to connect the dots that others may not see, and to learn a great deal from a conversation or meeting. These skills serve CDOs tremendously well as they collaborate with executive suite colleagues.

Questions to consider:

- Does the CDO know the goals of the various roles represented in the executive suite?
- What role can philanthropy play in the achievement of these goals?
- What operational topics would be of interest to donors?
- Who among executive suite colleagues can help clarify this information?

Celebrate, promote, and leverage successes in executive engagement.

Positioning philanthropy in the executive suite is easier when it is not done alone. As the leader of the organization's culture of philanthropy, knowing who can be leveraged to bring about a culture change is a matter of noticing, celebrating, and promoting the involvement that some executives may already be enacting.

As CDOs involve more executives in the culture of philanthropy, they must remember all involvement should be stewarded, as if it were a donor contribution. This means showing executives the impact of their involvement, respecting the expertise they bring to the table, and setting and meeting appropriate expectations.

Questions to consider:

- What experience do executive suite colleagues have in philanthropy?
- What training do executive suite colleagues have in philanthropy?
- What are the appropriate roles in philanthropy of these executives? (These may differ role to role.)
- Which executives are most supportive of the organization's philanthropic mission?
- Which executives are most willing to contribute to the organization's philanthropic mission?
- Whose enthusiasm can CDOs leverage to bring others on board?
- Who is already active in the culture of philanthropy?
 - For those who are already active, what return have they received on their involvement?

2. CDOS PRESENTING/VIEWING THEMSELVES AS VALUE-ADDED

“I think her [CDO] ability to deliver and be resourceful has been very good for us.”

—Chief Executive Officer

Demonstrate the strategy to be implemented.

As leaders, CEOs see and appreciate a CDO who is not afraid to tackle challenges. Particularly when a CEO is new to the role, or new to a strategy wherein philanthropy is heavily relied upon, CDOs can bring them along by demonstrating how fundraising is a thoughtful, nuanced process that can be learned, honed, and improved. By showing philanthropy as strategic work, CDOs can prove their value to executives who are process-oriented and evidence-focused.

Successful CDOs are confident in the strategy and process behind what they do. They are confident that their tactics work, and they are confident that they can share those tactics with their CEO and other executives as a means of involving them in the culture of philanthropy.

Questions to consider:

- What is the CDO's overall plan for leading the culture of philanthropy?
 - What is the strategy for achieving the plan?
 - What are the tactics for achieving the plan?
- In individual philanthropic opportunities, how does the CDO determine what funding priorities are feasible?
- In setting a philanthropic strategy, how does the CDO apply knowledge about the strategic direction of the organization?
- In working with specific donors, how does the CDO set goals? Are the goals broad or specific? What information goes into these decisions?
- In working with specific donors, how does the CDO form a strategy to achieve goals?
- In working with specific donors, what tactics does the CDO apply to achieve the goals?
- What quantifiable processes does the CDO follow?

Recognize and offer expertise.

As CDOs come from a variety of different backgrounds, they can offer expertise that their colleagues may not have anticipated. Remembering that confidence and humility are closely linked, CDOs describe that curiosity and willingness to learn and absorb the expertise of their colleagues has the dual effect of demonstrating humility and increasing confidence in their own knowledge and skill.

Questions to consider:

- Can the CDO offer value by submitting a community perspective on an issue?
- Can the CDO offer value by submitting a marketing perspective on an issue?
- Can the CDO offer value by offering a perspective that reflects his or her relationship expertise?
- Can the CDO offer value by submitting a public relations perspective on an issue?
- Can the CDO ask questions that bring the conversation forward?
- What does the CDO know already that enables him or her to add value?
- What could the CDO learn more about that would increase the value he or she brings to the table?

2. CDOS PRESENTING/VIEWING THEMSELVES AS VALUE-ADDED (CONT.)

Achieve excellence in fundraising.

When CDOs describe strong working relationships, they frequently mention things like trust, communication, and mutual respect. However, when CEOs are asked about strong working relationships, they focus on results. When CDOs' fundraising teams are meeting or achieving their goals, CEOs respect and trust them.

Questions to consider:

- Is the optimal fundraising team in place to achieve results?
- Has the team involved clinicians effectively in the culture of philanthropy?
- Has the team involved board members and volunteers effectively in the culture of philanthropy?
- Has the team involved organizational leaders effectively in the culture of philanthropy?
- Who needs to be trained to achieve better results? Who needs mentoring to achieve better results?
- Is the overall strategy for the culture of philanthropy working well? What are its strengths? What are its weaknesses?



3. CDOS APPROACHING ROLE WITH HUMILITY

“We are committed to being a learning organization, and [the CDO] welcomes that wholeheartedly. She’s always out there trying to learn, and she brings me ideas.”

—Chief Executive Officer

Strive to overcome stigmas.

As CDOs are aware, philanthropy is one of the best ways for organizations to increase their income and ensure they can meet their fiscal goals. But, the stigmas associated with the idea of soliciting philanthropic dollars can cause strong resistance and negativity. Participants in this study shared that they frequently encounter negative assumptions related to development as a profession, and they employ tactics for overcoming these in order to improve their executive suite relationships.

Questions to consider:

- Why does the CEO have negative assumptions about fundraising? What caused these assumptions?
- What are the negative assumptions the CEO has about fundraising?
- What does the CDO need to be an expert on?
- What does the CDO understand about healthcare operations that make him or her a valuable partner to the CEO?
- What does the CDO understand about fundraising that make him or her a valuable partner to the CEO?
- What strategic methods does the CDO regularly employ?
- How can strategic methods be positioned to be more widely understood?
- Does the CDO communicate in a way that reflects the strategic methods behind his or her work?
- Does the CDO have any habits that detract from his or her professional image?

Usually, negative associations related to philanthropy are not the CDO’s fault—but they are still within the CDO’s power to overcome. Many CDOs indicated that not having a seat at the table for strategic conversations is a red flag. In those situations, the CDO needs to build up credibility and grow the culture of philanthropy in order to be seen as truly value added.

To demonstrate the importance of CDOs having a seat at the table, CDOs can take the following steps:

1. Ask questions that facilitate understanding from a donor’s perspective.
2. Offer community perspectives on operational topics.
3. Provide evidential support for feasibility studies. (convert into data)
4. Demonstrate curiosity to other executives about their processes.

3. CDOS APPROACHING ROLE WITH HUMILITY (CONT.)

Discern when to dissent.

In an environment of many competing ideas, CDOs may find that CEOs' decisions do not coincide with what the fundraising body had envisioned. In these instances, sharing opinions with sensitivity is certainly possible, and more details on that topic are included in other sections of this report. In order to demonstrate humility, it is essential that CDOs are willing to concede some issues.

Equally important, CDOs recommend knowing when to concede and act in support of the CEO's wishes. Many CDOs mention keeping the ego in check, seeking to do what the CEO wants and support that vision whenever possible, and always emphasizing how a dissenting opinion may also achieve that vision.

Questions to consider:

- Is it too late to change this decision, or is there still time to negotiate?
- Does the CDO have new information about this decision that the CEO has not considered?
- Is the CEO highly committed to this decision?
- Has the CEO welcomed or invited the CDO's input on similar information in the past?
- What would be the consequences of NOT sharing a dissenting opinion?

View disagreements from a neutral perspective.

When holding an opinion contrary to the consensus, focus on putting the needs of the organization first. Rather than feeling personally offended by disagreements, recognize different perspectives and position philanthropy within those perspectives.

Those CDOs most satisfied with their executive suite relationships welcome challenges as an opportunity to put egos aside and problem-solve together. CDOs successful in this area make an effort to choose their battles and keep competition to a minimum.

Questions to consider:

- Does the CDO fully understand the contrary opinion?
- What questions does the CDO need answered about the contrary opinion? Who can answer the questions?
- If the contrary opinion were enacted, what would be the positive results?
- If the contrary opinion were enacted, what would be the negative results?
- If the CDO's opinion were enacted, what would be the positive results?
- If the CDO's opinion were enacted, what would be the negative results?
- Do those in disagreement fully understand the CDO's opinion? What can be clarified?
- Of these options, what is most desirable for the organization? Is a compromise possible?
- Ultimately, whose decision is it?

KEY IV. TRUST-BASED ENGAGEMENT

1. HONESTY

“I always want to know the good news and the bad news. Actually I always want to know the bad news first because then the good news will feel better. But I want to know what’s working well and I want to know what’s not working well, and that’s a part of every single meeting that we have.”

—Chief Executive Officer

Avoid assumptions and recognize reality.

As CDOs collaborate with CEOs in donor engagement, the CDO should never take for granted that a CEO is prepared to fulfill a certain role or has the requisite knowledge about a particular situation. CDOs should be honest in a way that promotes trust-based engagement by preparing for meetings in advance, leveraging opportunities to communicate important information, and assessing what information is important to share.

Study participants stressed that sharing information with CEOs means giving both good and bad news. When a contribution falls through or an existing donor declines in commitment and engagement, this information is essential for the CEO to know, even though it is unpleasant. As experienced executives, CEOs are not afraid of disappointment—but they almost universally stated that they wanted no surprises.

Questions to consider:

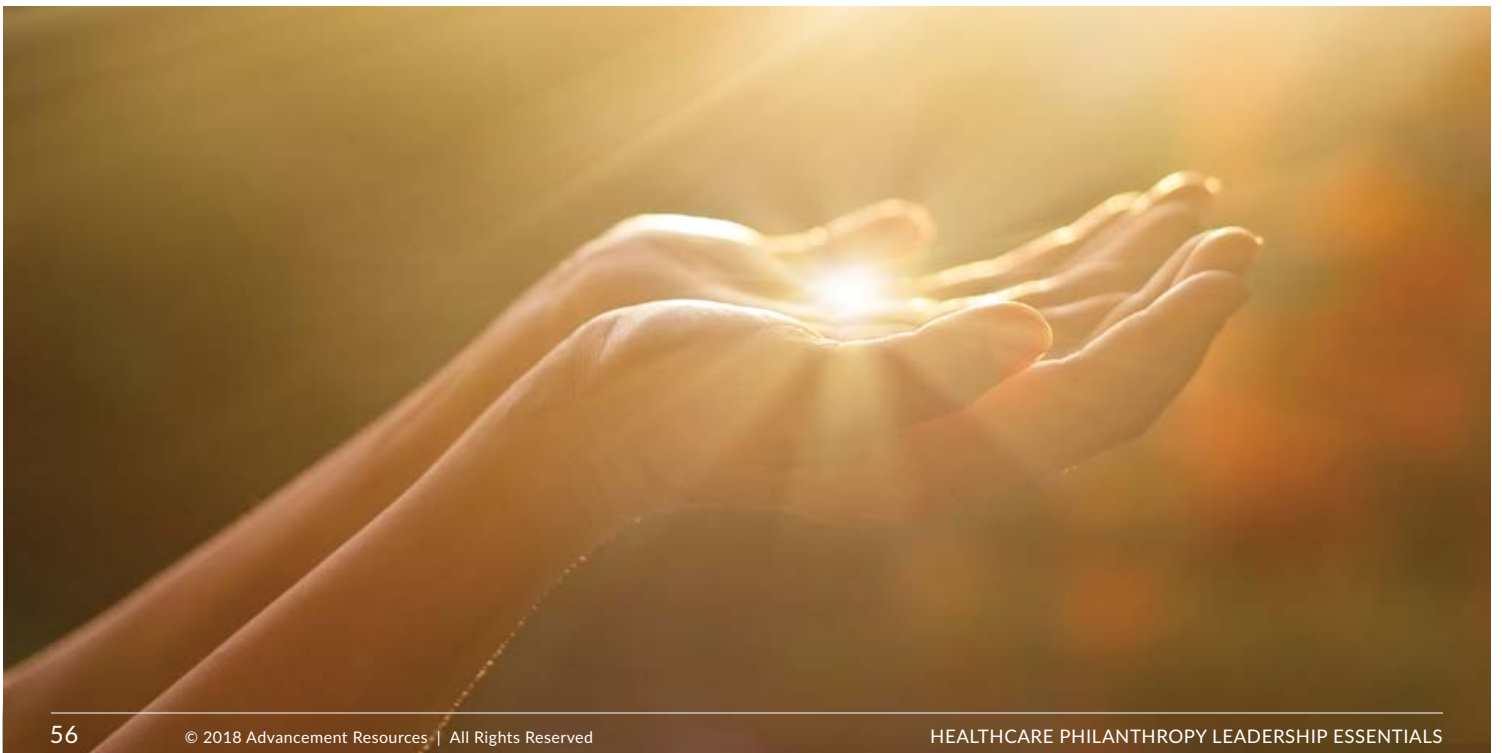
- Does the CEO have a strong knowledge base in philanthropy?

If not:

- What else does the CEO need to know?
- How can the CDO share that information?
- What is the best vehicle for sharing needed information?

If so:

- How does the CEO prefer to be involved in donor engagement?
- What donor information is necessary for a CEO to know?
- What is the best method for sharing donor information?



1. HONESTY (CONT.)

Share opinions honestly.

Recognizing that personality can have a major impact on each CEO's preferences, a CEO with a busy schedule and many demands is likely to appreciate directness in sharing relevant opinions. CEOs value a straightforward approach. While it is unlikely that any CDO intends to be dishonest with their CEO, omitting valuable details damages executive relationships and causes unnecessary difficulty. Particularly, in situations where the difference of opinion relates to something that may offend a donor or affect community engagement, the CDO has a responsibility to share.

Other strategies for expressing feedback to CEOs include modeling desired behaviors on donor visits, giving direct instructions in situations where the CEO may not be familiar with expected etiquette, and demonstrating that the CDO welcomes, appreciates, and applies any feedback that the CEO may provide.

Questions to consider:

- Have situations happened in which the CEO committed a faux pas related to philanthropy?
 - Did the CDO debrief the situation with the CEO afterward?
- In what other situations might a CDO need to give honest feedback to a CEO?
- What is the best method for addressing situations in which feedback is needed?
- What objections or responses might the CEO have to receiving honest feedback from the CDO?
- What are situations that should be handled through methods other than a straightforward conversation?

Proactively seek a consensus.

The CDO/CEO collaboration is critical in achieving the organization's priorities—but there must be a consensus on what these priorities are, how the organization is going about acquiring support for them, and what resources can be devoted to that effort. A trust-based engagement between CDO and CEO will feature a consensus on this important strategy, including reliance on funds to be raised and honesty about the feasibility of these goals. If there is any discrepancy or uncertainty related to those goals, the CDO must proactively seek a consensus.

Questions to consider:

- Do the CDO and CEO agree on the organization's fundraising priorities?
- Do the CDO and CEO disagree on any of the priorities?
- What is the evidence of a consensus? Are there any gray areas?
- How have the fundraising priorities been established?
 - How often are the priorities assessed?
 - What information is used to assess?
- Is any information needed about the organization's strategic direction and fundraising priorities that the CDO does not have?
- Does the CDO have the organizational support in place to achieve the goals?

If an organization has consistent fundraising priorities in place but does not have the infrastructure to support raising those funds, a CDO can implement the following strategies to garner greater support:

1. Leverage the engagement of other members of the executive suite and board.
2. Utilize past metrics to project cost-of-dollar-raised estimates for the future.
3. Conduct feasibility studies to demonstrate the efficacy of philanthropy to achieve benchmarks.
4. Present ideas in the format of solutions to existing problems.

2. TRUST

“If I’ve learned anything, if something in the room is said, between the two of us or with others, he [my CEO] has to know he can trust me. He’s got to have the confidence that our conversations are confidential, and when I bring something back to him from a board member that I think he should know, that’s how you build up that trust.”

—Chief Development Officer

Give and receive feedback well.

CEOs depend on their CDOs to advise them as the CDO leads the organization’s culture of philanthropy. Therefore, it is essential that a relationship of mutual trust is established so that the advice of the CDO can be received and applied well. CDOs who are successful in establishing strong degrees of trust have learned to give and receive feedback in a manner that is helpful, inoffensive, and timely. They also establish a precedent of feedback being utilized appropriately in their executive suite relationships by being themselves open to the notes and suggestions of other executives.

Questions to consider:

- What advice has the CDO received in the executive suite?
- How does the CDO typically respond to advice?
- How can the CDO improve the manner in which he or she responds to the CEO’s suggestions or advice?
- What philanthropy skills could the CEO hone more highly? What assistance can the CDO provide?
- What can the CDO do to demonstrate respect while giving feedback?



2. TRUST (CONT.)

Don't wait to be asked to participate.

Survey respondents indicated that some trust-based behaviors are simply less likely than others. In situations in which a CDO desires to have greater trust than is currently demonstrated, the CDO can approach executive relationships with confidence that, as a philanthropy expert and the leader of the organization's culture of philanthropy, their opinions are needed and ought to be shared.

Questions to consider:

- Does the CDO participate in strategic/operational meetings?
 - If the CDO does not participate, would he or she be welcome to do so if he or she asked?
 - What reasons would the CDO give to justify the need to participate in these meetings?
 - If the CDO does participate, what topics are typically discussed? How does philanthropy relate to these topics?
- Does the CDO leverage executive suite relationships to engage clinicians and others in the organization's culture of philanthropy?
- What opportunities typically arise in executive suite meetings to share a community or philanthropic perspective?
- In what situations might an "outside" perspective assist the development of operations and strategic policies?
- What information ought the CDO learn in order to participate more actively in these conversations?
- What can the CDO do to build confidence and feel more comfortable in this skill?

Make trust a self-fulfilling prophesy.

When CDOs believe they are not respected, they can often respond with behaviors that attempt to overcompensate. These behaviors may occur whether or not the perceived lack of respect is a reality. To avoid this common pitfall, CDOs can approach their work with the confidence that they deserve and are able to earn trust.

When CDOs do not participate in strategic meetings, the following negative consequences may occur:

- The CDO is unaware of important information that donors may wish to know.
- The CDO is not viewed as part of the executive suite by other executives.
- The CDO cannot offer the community/stakeholder perspective on strategic topics.
- The CEO views philanthropy as a part of the organization that is separate from its overall strategy.
- The CEO views his or her own fundraising role as tertiary to other executive responsibilities.

Questions to consider:

- Does the CDO feel trusted by the CEO?
 - What are behaviors that the CEO exhibits that cause the CDO to feel trusted?
 - What are behaviors that the CEO exhibits that cause the CDO to feel mistrust?
- What does the CDO do that is worthy of trust?
- What mistakes has the CDO made that may cause mistrust from the CEO?
- How can the CDO respond to past mistakes in a way that builds future trust?

3. RESPECT

“If you have two personalities that clash, it’s going to be a real struggle. Spend enough time building that relationship to know you can have a good relationship with your CEO.”

—Chief Development Officer

Regard the CEO in a positive light.

CDOs may encounter CEOs with varying lengths of tenure. No matter who the CEO or what their philosophy or experience level in philanthropy is, the CDO will be closer to achieving a strong working relationship if he or she respects the CEO for being the CEO. A positive relationship begins not with pre-existing agreement but with openness to exploring how the two executives can work together to bring about the greatest possible good for the organization.

Questions to consider:

- What are the CEO’s past experiences?
- In what areas is the CEO an expert?
- What can the CDO learn from the CEO?
- What does the CDO appreciate about the CEO’s working style?
- What does the CDO appreciate about the CEO’s vision for the organization?
- How can the CDO demonstrate to the CEO that the CDO supports him or her?
- In areas where the CDO disagrees with the CEO, what is the CEO’s point of view? How can the CDO learn it?

Recognize the CEO’s authority.

While all professional relationships may sometimes have conflicts, the CEO has the official authority as the top decision maker of the organization. As such, no conflict ought to result in a CDO’s continual opposition to the CEO’s opinion, even when the CDO is firmly opposed. Respecting the CEO’s authority is only possible when the CDO and CEO trust each other.

Questions to consider:

- Does the CDO trust the CEO to make the best possible decisions for the organization?
- What are the consequences of the CEO’s decision? (both positive and negative)
- Has the CDO presented all possible information related to any disagreements?
- Has the CDO demonstrated willingness likewise to listen and compromise?
- Can a compromise be reached?



3. RESPECT (CONT.)

Assess and respond fairly.

As philanthropy grows as a greater opportunity, some organizations and CEOs may be highly resistant to this trend. Where organizations are reluctant to embrace philanthropy and make questionable decisions regarding philanthropy, CDOs can find insurmountable resistance. If the CDO and CEO have tried many strategies and are unable to create an environment where their partnership is mutually respectful, trusting, and honest, then the CDO may consider seeking a position where the environment related to philanthropy is more tenable.

Questions to consider:

- Has the CDO made an effort to share the value of philanthropy with the CEO?
- Has the CDO made an effort to share knowledge of philanthropy with the CEO?
- Has the CDO made an effort to gain operational knowledge?
- Has the CDO worked with the CEO to establish a common view of philanthropy's role?
- Has the CDO established regular meeting practices with the CEO?
- Does the CDO make an effort to disagree without argument and communicate strategically?
- Does the CDO leverage other executive suite relationships?
- Does the CDO have a balance of confidence and humility in collaborating with the CEO?
- Does the CDO view the CEO's engagement with the same strategic approach as donor cultivation?
- Does the CDO leverage relationship expertise to improve the executive relationship?

If the CDO has applied these strategies and still feels the relationship with the CEO is untenable, then it may be time to adjust expectations. If the CDO believes the culture of philanthropy can still be built without strong CEO support, the CDO must strategize to do so.



KEY V. STRATEGIC RELATIONSHIP CULTIVATION

1. SEEING THE CEO AS AN “INTERNAL DONOR”

“We’ll take three years and we’ll cultivate a relationship to get a gift, but we have absolutely no patience with our hospital CEOs and our ops team.”

—Chief Development Officer

Adjust one's mindset.

The mindset of viewing the CEO as an “internal donor” involves altering the way the CDOs think about their relationship with their CEOs. This gradual adjustment involves viewing disagreements or discrepancies as temporary and changeable. Engagement in philanthropy is a continuum, and the CEO can increase in engagement over time as his or her investment in the culture of philanthropy provides a return. To enable this shift, CDOs should approach the CEO as they do a donor.

Questions to consider:

- Does the CEO view the CDO as someone who can help them achieve goals?
- Does the CDO view the CEO as an obstacle, or as a partner?
- Does the CDO work to help the CEO achieve goals?
- What stories can the CDO tell to help the CEO see the value of philanthropy?
- Does the CDO have reasonable expectations for the length of time required to improve the relationship?

Adjust one's actions.

Viewing the CEO as an “internal donor” requires approaching the relationship strategically, the same way CDOs approach cultivating relationships with donors—from initial meeting, to progressing the relationships up over time through varying levels of commitment, to stewardship and further long-term mutually beneficial engagement.

Questions to consider:

- Is the CEO aware of and bought in to the importance of philanthropy?
- What are the CEO’s passions, goals, and institutional objectives?
- How can philanthropy help achieve the goals?
- Reviewing past communications with the CEO, what strategy has been effective? What hasn’t worked? What can be learned from these experiences?
- Prior to each interaction with the CEO, ask, does the CDO ask how can this be leveraged to deepen the CEO’s philanthropic engagement?
- Is the CDO consistent, timely, and relevant in communications with the CEO?
- Has the CDO stewarded the CEO’s philanthropic engagement by providing a meaningful return in a way that resonates with the CEO’s own experiences and goals?

2. ADOPTING A STRATEGIC APPROACH TO ENGAGING THE CEO

“Educate, take them on calls. My [CEO] was not expecting to learn as much as he did when we started making calls together. He became a believer.”

—Chief Development Officer

Consider learning styles.

Different people learn in different ways, and there are some CEOs who will not benefit from collaborating or watching the CDO work as much as they would from having a detailed conversation, being recommended a book to read, or seeing results through a meaningful story. CDOs share information with the CEOs in the way that would work best for them; rather, they should have the conversations necessary to identify what would work best for the CEO, and plan a strategy accordingly.

Questions to consider:

- What communication method does the CEO respond best to?
- Is the CEO open to learning more about philanthropy?
- Does the CEO ask questions when something about philanthropy is not understood?
- If the CEO does not ask questions, how can the CDO determine what information may be needed? What strategies can be used?
- What knowledge gaps exist in the CEO's work in philanthropy?
- What information is most urgent to share soonest?
- What method of sharing information is most efficient?
- What stories can be used to convey this information memorably?

Honor the organization's culture.

A plan to increase philanthropic knowledge in the executive suite must be tailored to the specific people and environment at each organization, with some being highly collaborative and others more separate. As the leader of the culture of philanthropy, CDOs must use their expertise about the organization to strategize.

Questions to consider:

- Who in the executive suite can be leveraged to assist in a strategy?
- What are the various areas of expertise represented in the executive suite?
- What is the best way to share information with the CEO while being respectful of his or her time?
- What does the CEO want to learn more about?
- What are the CEO's highest philanthropic priorities? What can be shared that will be most effective for achieving these?



3. EMOTIONAL INTELLIGENCE SKILLS AND RELATIONSHIP EXPERTISE

“It’s important because it all comes down to relationships. So behind all those challenges and opportunities, it’s all the relationships.”

—Chief Development Officer

Leverage existing skills.

CDOs working in the executive suite are already experts in dealing with executives and individuals in the executive suite of other industries. As relationship experts, CDOs should not be afraid to rely on these “soft skills” to bring about positive interactions in their own executive suites. At the very least, these skills can create goodwill that can be leveraged to promote greater philanthropic engagement.

Questions to consider:

- How can the CDO get to know the CEO better?
- What can the CDO do to build trust and respect? (see Key IV.)
- Does the CDO project a positive, professional image?
- Does the CDO share appreciation for the roles the CEO and executive suite members play?
- Does the CDO make the CEO and other executives feel heard and understood?

Acquire and hone new skills.

Emotional intelligence is the ability to recognize emotions, to understand and predict their effect, and to use that ability to better understand oneself, one's colleagues, and the world in general. Better emotional intelligence can improve executive suite relationships—and indeed, all relationships.

Questions to consider:

- How does the CDO typically respond to professional communications of various kinds? (criticism, praise, conflict, etc.)
- How can the CDO improve responses in order to honor the communicator and gain insight into their perspectives?
- What is the difference between responding and reacting?
- When criticism is given, how can the CDO re-frame it as an opportunity to learn?
- What truth is at the heart of criticism?
- In what situations does the CDO want to improve emotional responses? What actions can be taken to help improve responses?





STATISTICS AND FACTS



CONTEXTUAL DATA

This section reports data and contextual information about the study participants, including:

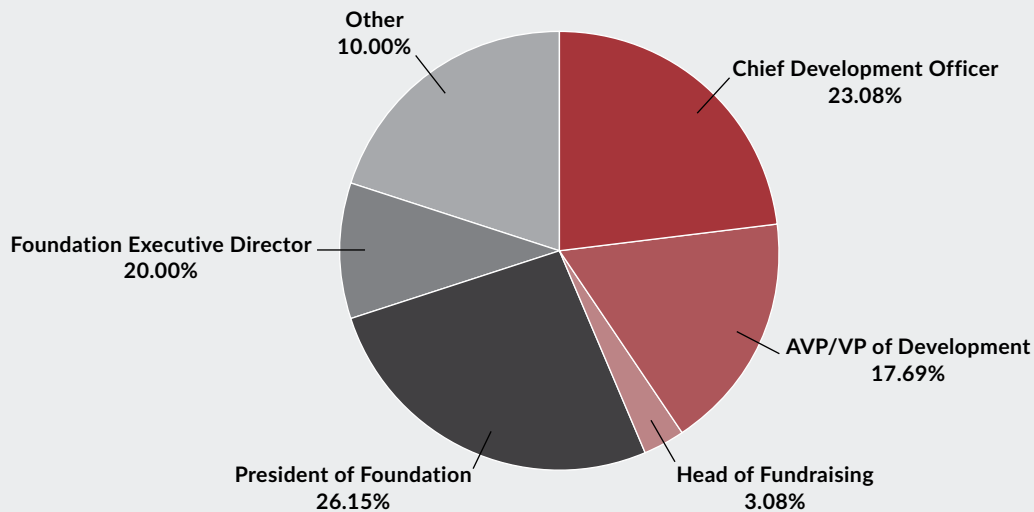
- Business titles of development leaders*
- Types of healthcare organizations represented
- To whom CDOs report
- Who is responsible for hiring CDOs
- How frequently CDOs meet with the CEOs, formally and informally
- Preferred methods of communications between CDOs and CEOs
- CDOs' portfolio size
- Which executives CDOs find most challenging to engage

BUSINESS TITLES OF DEVELOPMENT LEADERS

The following chart shows a breakdown by title of the development leaders who participated in our study.

The majority of the “Other” responses were self-reported titles that included the word “philanthropy”—none of those repeated, so we did not create a new section for them. It is also interesting that “Head of Fundraising” is a title held by only 3% of respondents. Collectively, this strongly suggests that in the medical arena, the terms “fundraising” and “philanthropy” are far less frequently used as official terms than the term “development.”

6.00: Business titles of development leaders

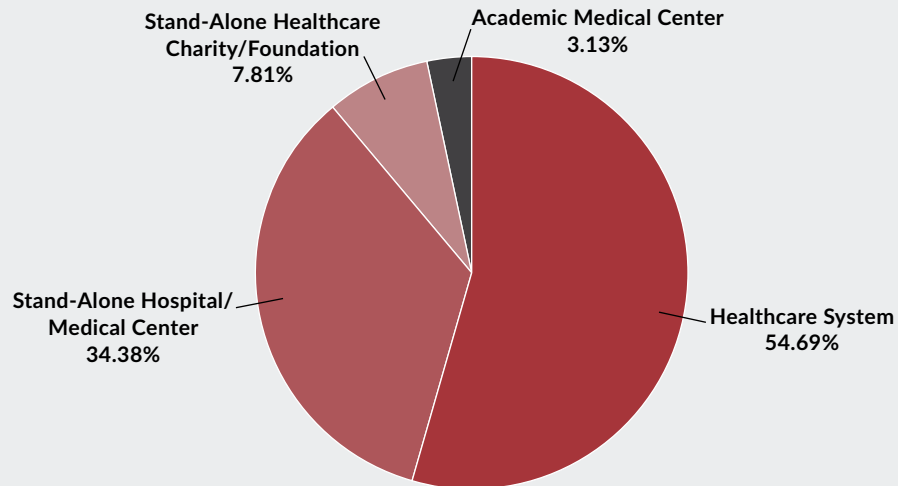


*For the purpose of this study, all development leaders are referred to as CDOs.

ORGANIZATION TYPES SURVEYED

The following chart shows a breakdown by percentage of what type of organization the surveyed healthcare CDOs represented.

6.01: Organization types surveyed

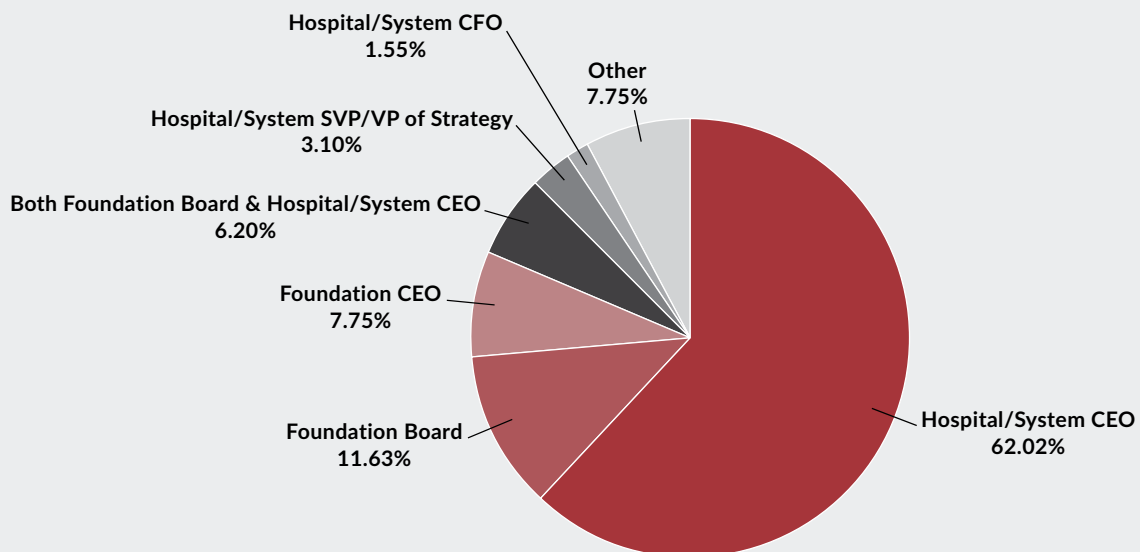


As expected, due to the numerous mergers and acquisitions seen throughout the industry in recent years, the majority of survey respondents (55%) work as part of a healthcare system (either at the system level or a hospital within a system).

TO WHOM CDOS REPORT

This data shows that CDOs most frequently report to the hospital or system CEO, reinforcing the necessity of a strong CDO-CEO relationship to leverage toward greater CEO engagement in philanthropy.

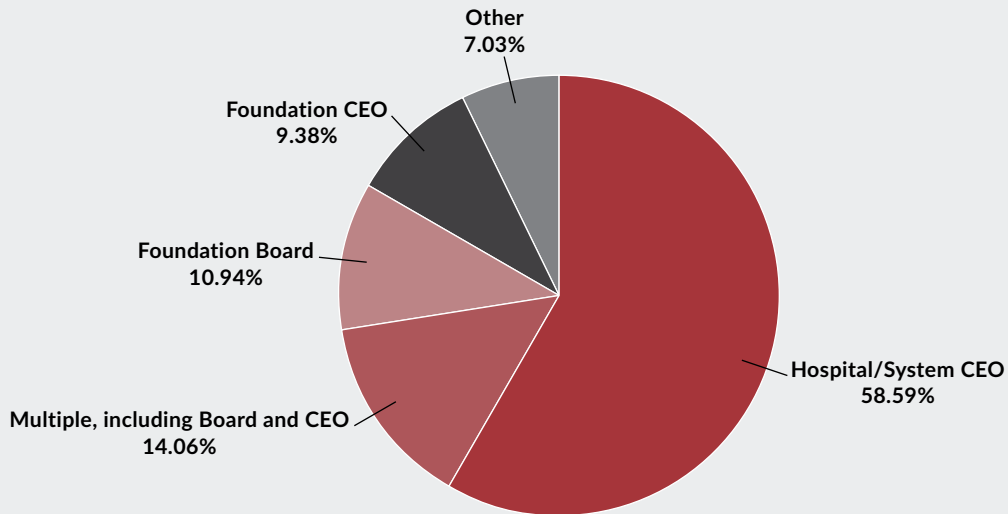
6.02: To whom CDOs report



WHO WAS RESPONSIBLE FOR HIRING CDOs

This chart shows what role was primarily responsible for the decision of whom to hire to fill the CDO position.

6.03: Who was responsible for hiring CDOs



MEETING FREQUENCY BETWEEN CDOs AND CEOs

This chart shows statistics for the various levels of formal meeting frequency between CDOs and their CEOs.

6.04: **Formal** meeting frequency with CEO to discuss fundraising activity % of CDOs reported

Daily	0.00%
More than once a week	2.50%
Once a week	10.83%
Twice a month	32.50%
Once a month	40.83%
Once a quarter	12.50%
Once a year	0.83%

This chart shows statistics for the various levels of informal meeting or discussion frequency between CDOs and their CEOs.

6.05: **Informal** meeting frequency with CEO % of CDOs reported

Daily	10.83%
More than once a week	25.00%
Once a week	32.50%
Twice a month	16.67%
Once a month	13.33%
Once a quarter	0.83%
Once a year	0.83%

PREFERRED METHODS OF COMMUNICATION BETWEEN CDOS AND CEOS

This chart shows healthcare CEOs' preferred method for informal communications (as reported by the CDOs that work with them).

6.06: CEO's preferred method for informal communication

43.33%	Face-to-face
32.50%	Email
8.33%	Text
6.67%	Phone call
5.83%	Unknown
3.33%	Other

CDOS' PORTFOLIOS

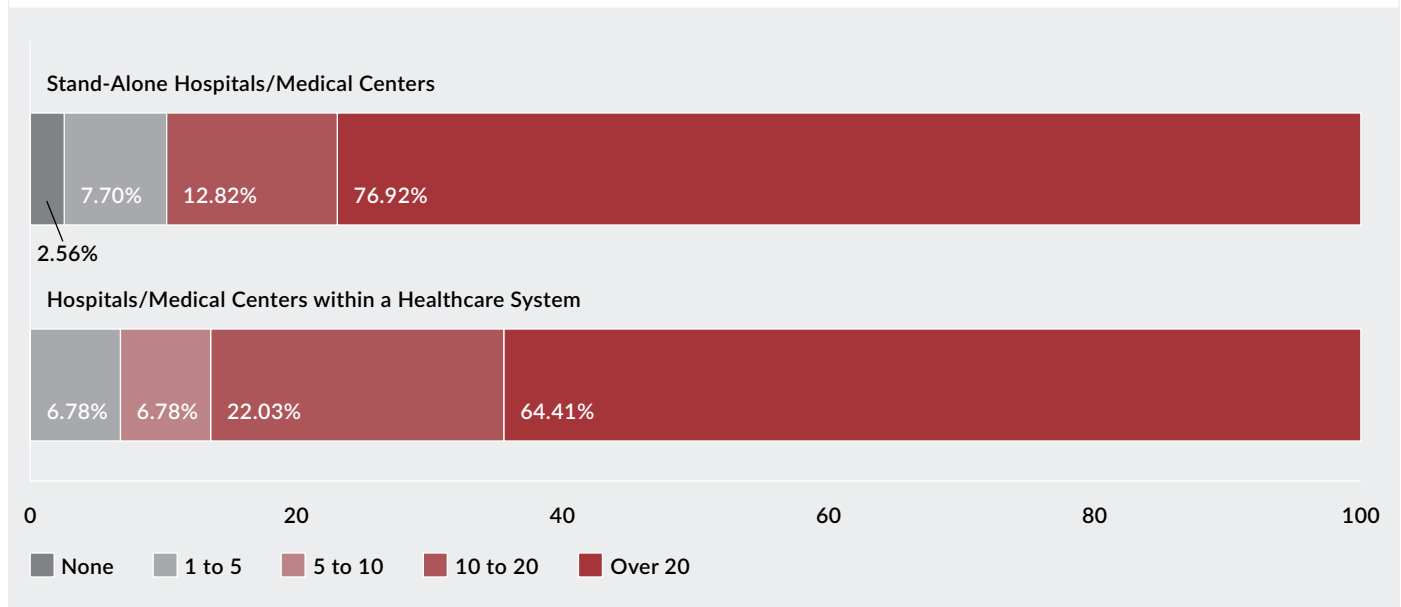
The following chart shows data for what size of donor portfolios, if any, that study respondents maintain on top of performing their duties as CDOs.

6.07: CDO's portfolio size of donors/potential donors

1.67%	None
6.67%	1 to 5
3.33%	5 to 10
20.83%	10 to 20
67.50%	Over 20

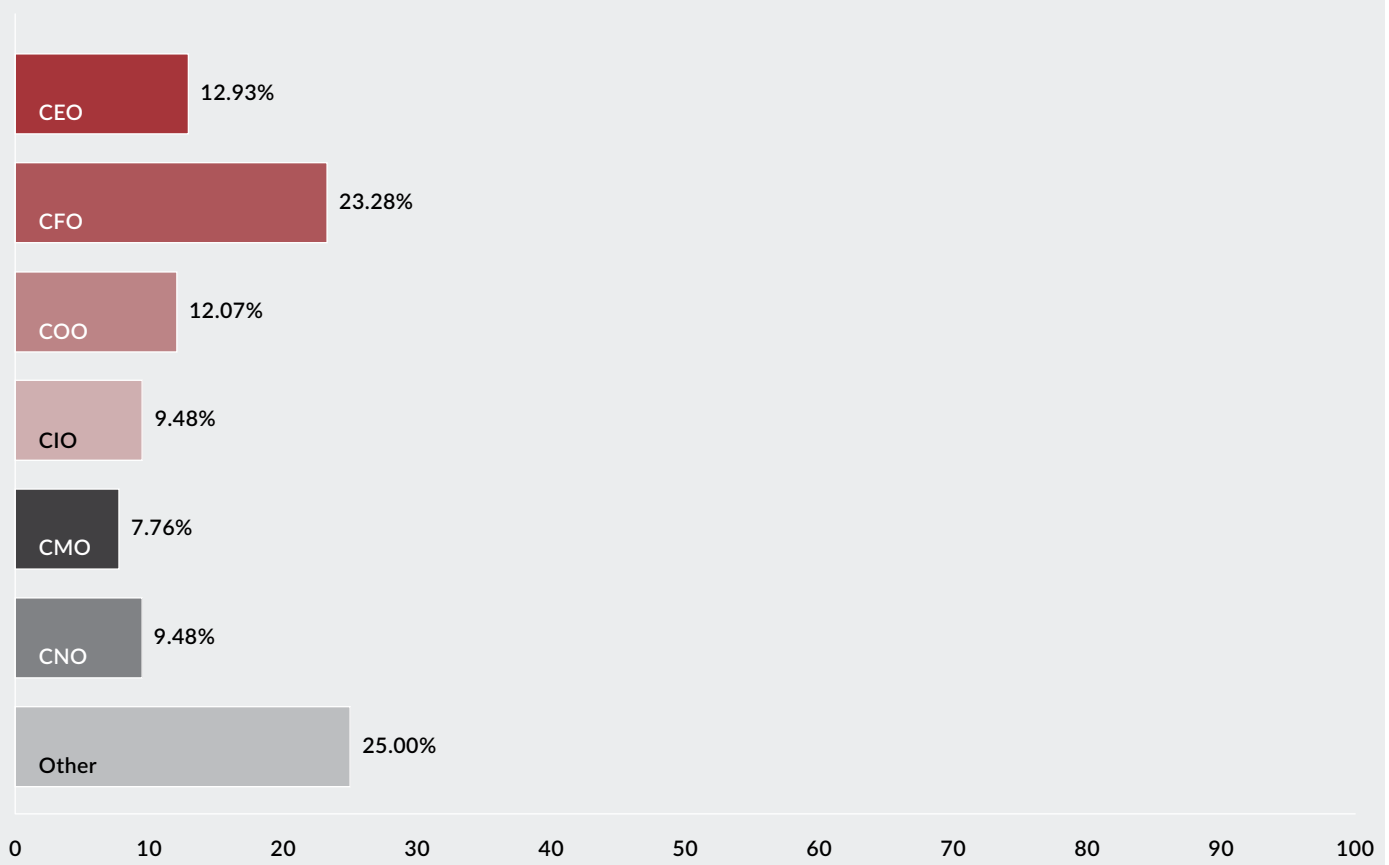
Segmenting the results from this question by organization type reveals that CDOs at stand-alone hospitals/medical centers are more likely to maintain a portfolio of over 20 donors than CDOs within healthcare systems—**76.92% vs. 64.41%**.

6.08: CDO's portfolio size of donors/potential donors per organization type



WHICH EXECUTIVE ROLES CDOS FIND MOST CHALLENGING TO ENGAGE

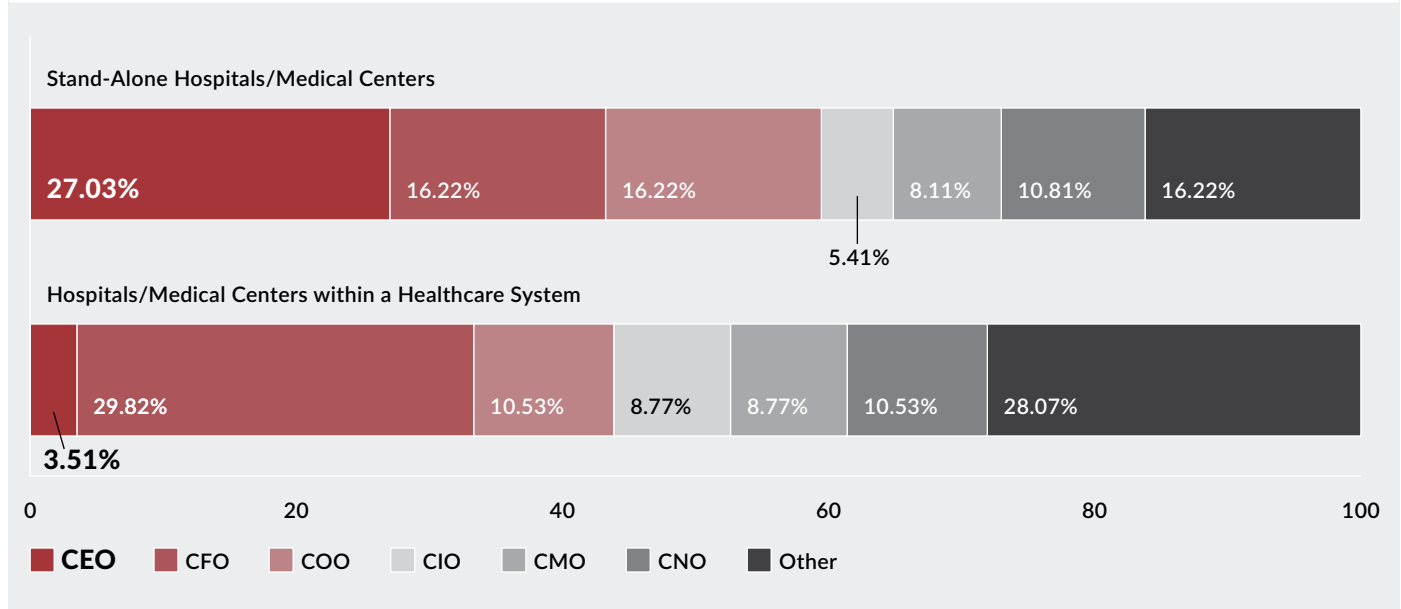
6.09: CDO's most challenging executive suite relationships



WHICH EXECUTIVE ROLES CDOS FIND MOST CHALLENGING TO ENGAGE (CONT.)

Segmenting the results from this question by organization type reveals that the relationship between the CDO and the CEO at stand-alone hospitals/medical centers is by far the most challenging, whereas at the healthcare system level CDOs find it more challenging to work with CFOs.

6.10: Most challenging executive suite relationships by organization type



CEO BEHAVIORS

The following table lists in descending order, the frequency of various observable CEO behaviors as reported by CDOs.

6.11: Observable CEO Behaviors	% of CDOs reported
Participates in donor meetings when asked	87.72%
Accepts CDO's feedback on fundraising topics	85.96%
Responds to CDO's informal phone calls	83.33%
Responds to CDO's email	79.82%
Listens to CDO's opinions	78.95%
Invites CDO's participation in strategic/operational meetings	69.30%
Requests CDO's opinions	68.42%
Asks questions when they don't understand something relating to philanthropy	64.04%
Assigns important tasks to CDO	62.28%
Acknowledges their own shortcomings relating to philanthropy	52.63%
Introduces CDO to VIPs	49.12%

This table demonstrates the opportunity for improvement that exists in healthcare philanthropy executive relationships. For example, the top response of **87.7%** for “Participates in donor meetings when asked” suggests that 1 in 10 CDOs struggle to engage their CEO in donor meetings.

Furthermore, about half of CEOs do not acknowledge their shortcomings relating to philanthropy. Nearly half of CDOs are not assigned important tasks by CEOs, and a third are not asked for their opinions. Therefore, although CDOs reported high average scores for quality of relationship, quality of communications, and level of trust, the specific behaviors reported undermine these ratings to a degree.



SELF-APPRAISED DATA

This section reports the results of the survey questions that asked CDOs to rate their relationships with their CEOs and various facets of those relationships. This data is an aggregate of respondents' subjective ratings. It is important to note that these ratings are all one-way in that the survey was designed for and offered to only CDOs. It cannot be presumed that any future study of this nature that asks CEOs to rate their CDOs would produce identical results.

This section will provide insight from CDOs self-reported ratings on these topics:

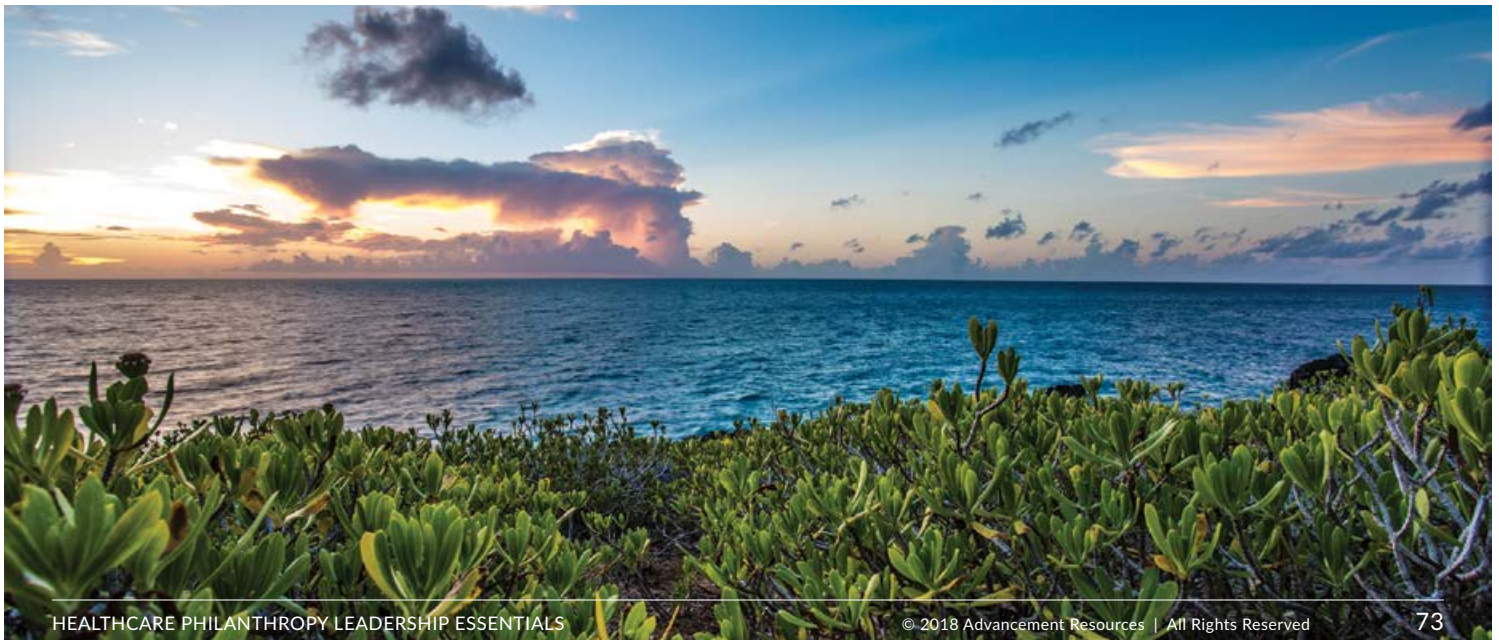
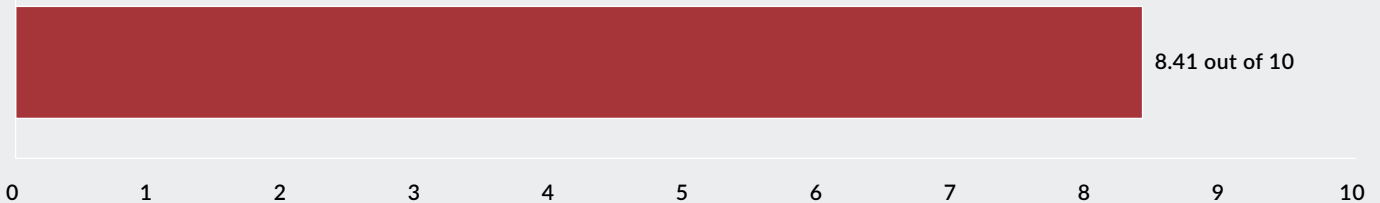
- Overall rating of CDO-CEO relationship success
- Level of respect CDOs have for their CEOs
- Quality of communications between CDOs and CEOs
- CDOs' understanding of healthcare day-to-day operations and how important those operations are for development to understand
- CDOs' level of confidence in engaging other executives on both fundraising and non-fundraising topics
- How much CDOs believe their CEOs understand about philanthropy
- How much CDOs believe their CEOs trust them
- How much CDOs believe their CEOs respect them
- How much CDOs believe they and their CEOs share a vision for what philanthropy means at their organization
- What the important elements are in successful CDO-CEO relationships

OVERALL RATING OF CDO-CEO RELATIONSHIP SUCCESS

CDOs scored the success of their working relationships with their CEOs at a weighted average of **8.41** on a 10-point scale.

7.00: CDO-CEO relationship success

Weighted Average



OVERALL RATING OF CDO-CEO RELATIONSHIP SUCCESS (CONT.)

Most CDOs score their relationships very high, with a full **30.8%** giving the relationship a perfect 10.

7.01: CDO-CEO Relationship Score

% of CDOs that scored their CDO-CEO Relationship a 1 out of 10	0.0%
2 out of 10	1.67%
3 out of 10	0.0%
4 out of 10	2.50%
5 out of 10	3.33%
6 out of 10	5.00%
7 out of 10	10.00%
8 out of 10	17.50%
9 out of 10	29.17%
10 out of 10	30.83%

By classifying a score of 1–3 as negative, 4–7 neutral, and 8–10 positive, we can classify the survey respondents thusly:

7.02: Quality of CDO-CEO Relationship

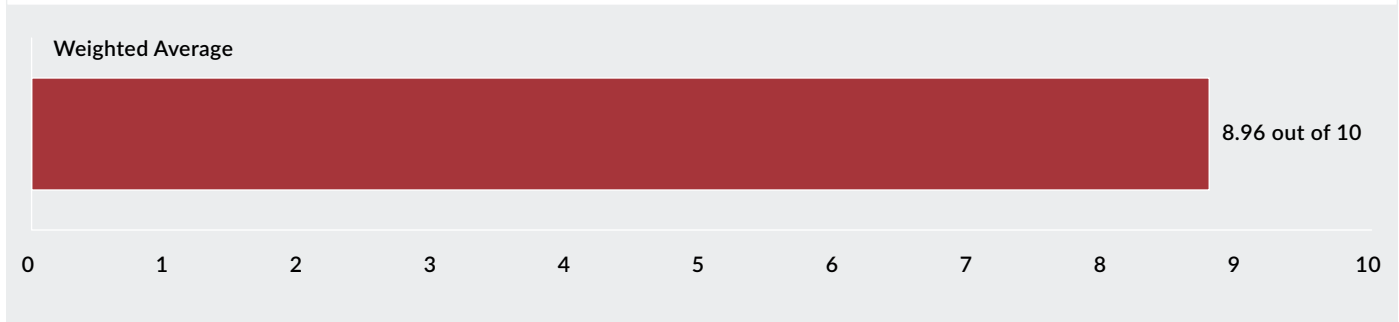
Negative	1.67% of organizations
Neutral	20.83%
Positive	77.50%

It is important to note that there is inherent self-bias involved in self-reported numbers, and that these numbers are a reflection of how CDOs rate their own relationships when asked to score it out of 10. There are numerous other factors highlighted in this report, including survey data and information uncovered in in-depth interviews, that strongly suggest that CDO-CEO relationships are not as strong as these numbers may imply. These groupings will be used in a following section of the report to identify key differences between positive and negative/neutral CDO-CEO relationships.



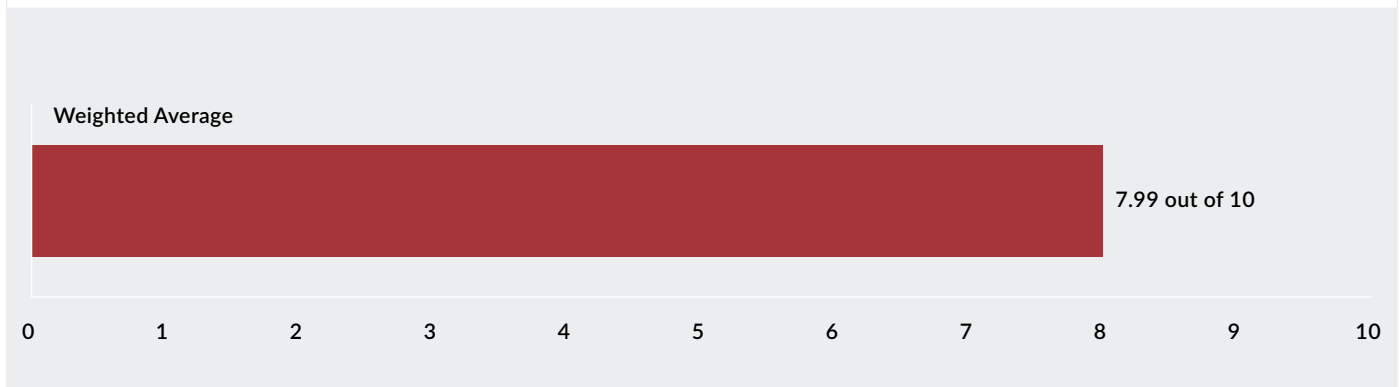
CDO'S LEVEL OF RESPECT FOR CEO

7.03: CDO's level of respect for CEO



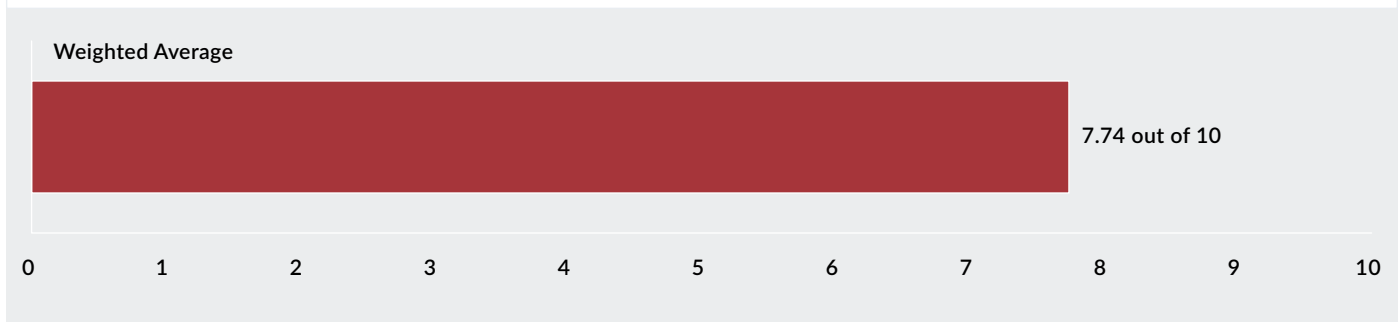
QUALITY OF COMMUNICATIONS BETWEEN CDOS AND CEOs

7.04: CDO-CEO quality of communications



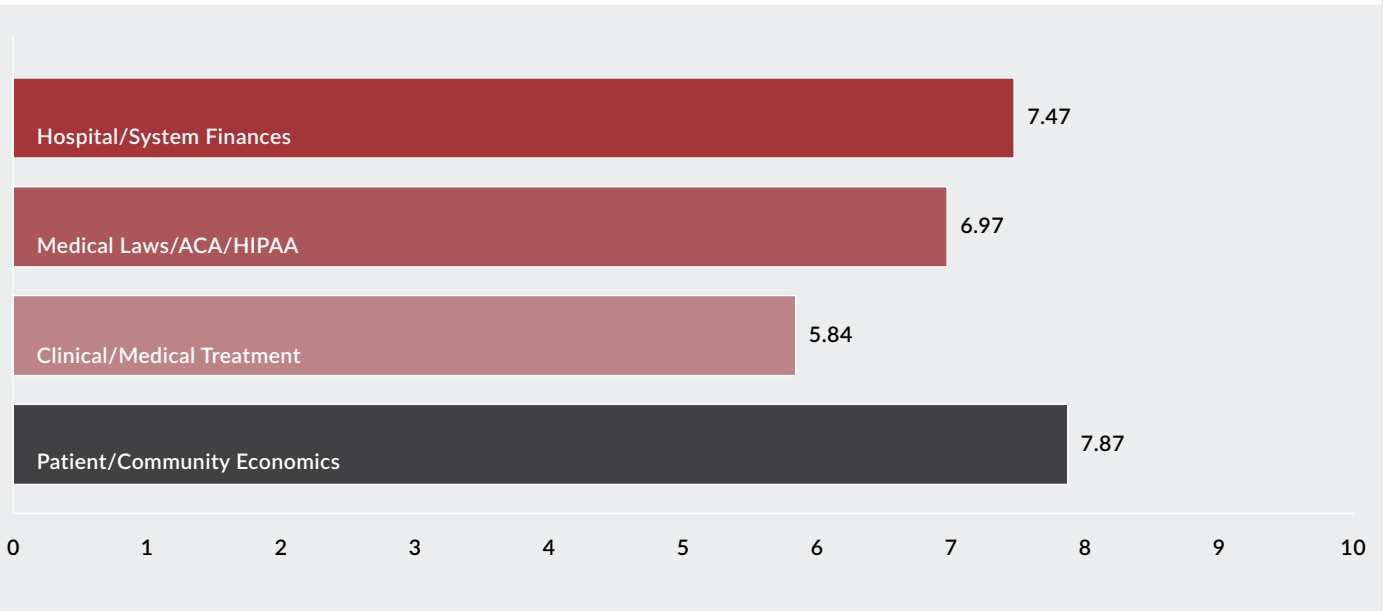
CDOS' UNDERSTANDING OF HEALTHCARE DAY-TO-DAY OPERATIONS

7.05: CDO's understanding of healthcare day-to-day operations



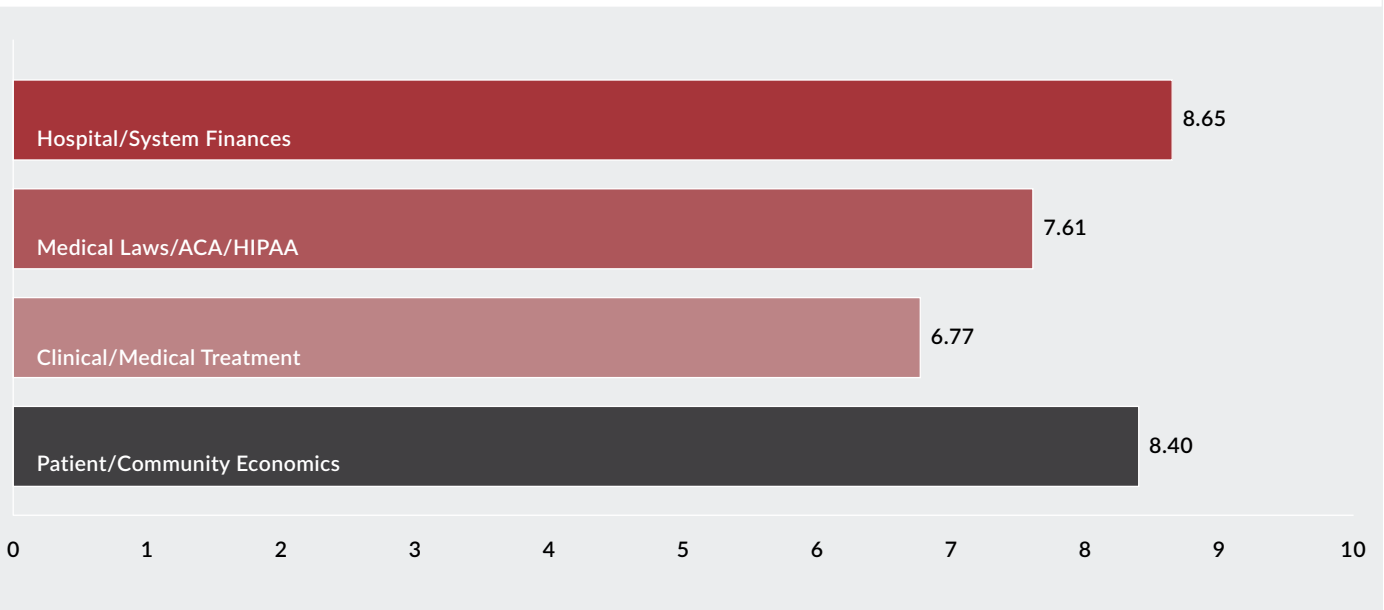
CDOS' UNDERSTANDING OF HEALTHCARE DAY-TO-DAY OPERATIONS BY TOPIC

7.06: CDO knowledge of operational topics



HOW IMPORTANT CDOS' UNDERSTANDING OF DAY-TO-DAY OPERATIONS IS BY TOPIC

7.07: How important CDOs understanding of day-to-day operations is by topic

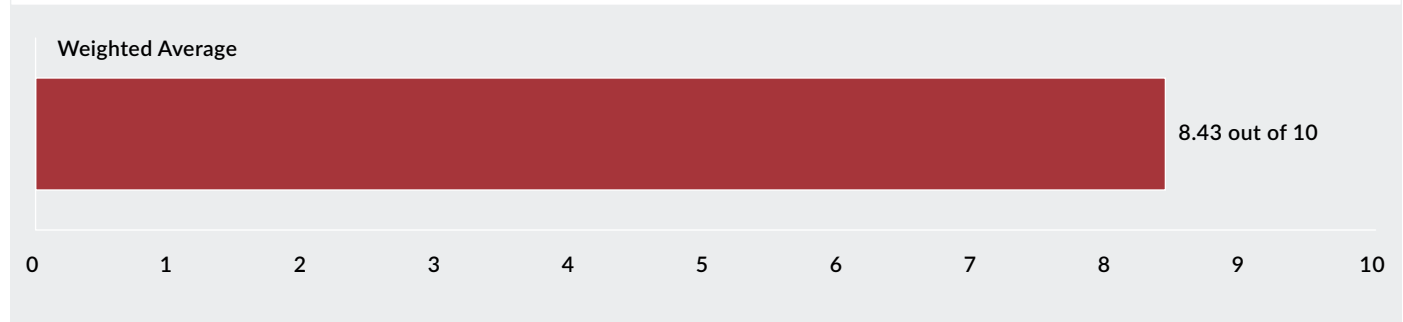


Data suggests that CDOs' actual knowledge is proportionally in line with what knowledge they believe they should have. Despite data-gathering interventions designed to prevent this occurrence, it still occurred. However, it is of interest that the averages are slightly lower on reported actual knowledge compared with how important that knowledge is—suggesting CDOs feel they need to improve their knowledge in these areas.

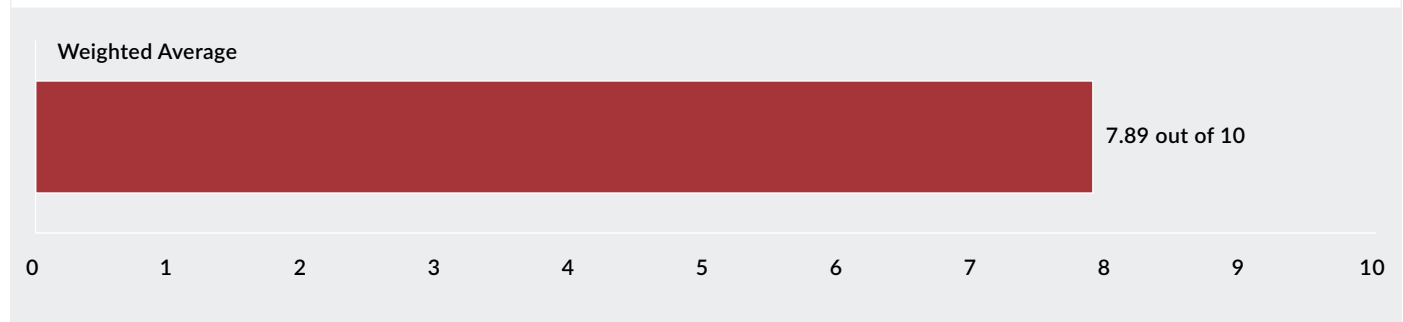
CDOS' LEVEL OF CONFIDENCE IN ENGAGING WITH OTHER EXECUTIVES IN BOTH FUNDRAISING AND NON-FUNDRAISING TOPICS

The following two charts display CDOs' confidence in engaging executives on both fundraising and non-fundraising topics. The numbers show that there is naturally a decline in confidence when CDOs tackle non-fundraising topics.

7.08: CDO's level of confidence in engaging with executives about **fundraising topics**

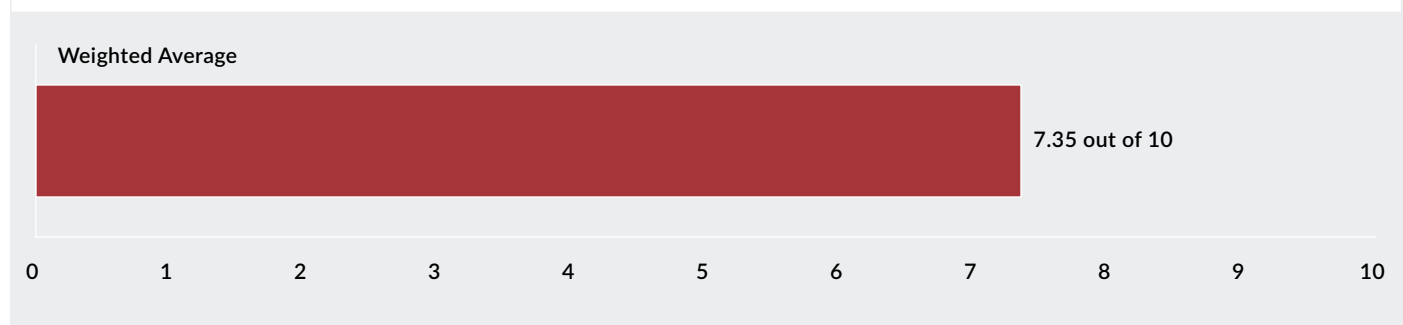


7.09: CDO's level of confidence in engaging with executives about **non-fundraising topics**



HOW MUCH CDOS BELIEVE THEIR CEOS UNDERSTAND ABOUT PHILANTHROPY

7.10: How much CDOs believe their CEOs understand about philanthropy



HOW MUCH CDOs BELIEVE THEIR CEOs UNDERSTAND ABOUT VARIOUS PHILANTHROPIC TOPICS

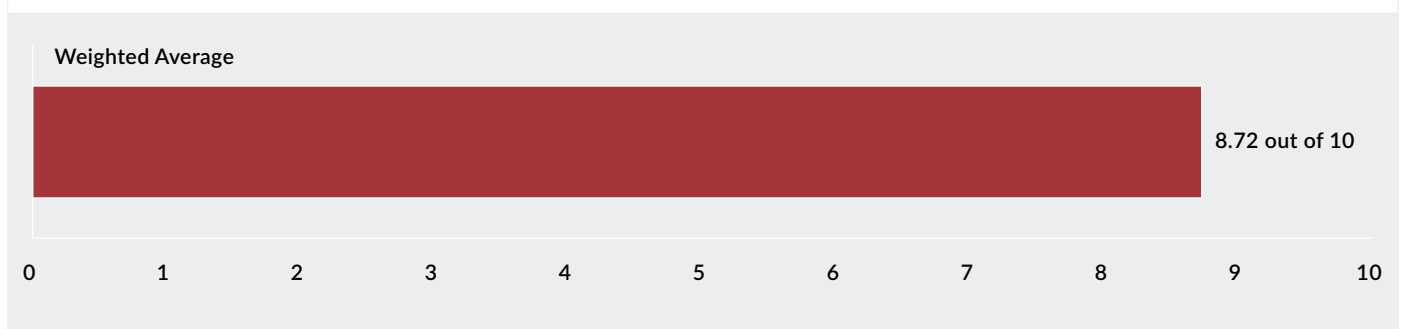
7.11: How much CDOs believe their CEOs understand about various philanthropic topics

	CDO Rating
The donor development process	6.44
The amount of time required to secure a major gift	6.03
Major gifts strategy	6.03
Events fundraising strategy	6.11
Annual giving strategy	5.43
Matching philanthropic passions to organizational initiatives	6.67
Fundable priorities	6.78

Interestingly, calculating the average of these topics produces an overall score of **6.21 out of 10**. This is significantly lower than the **7.35 out of 10** as reported in the previous question, suggesting that, when asked to explore the components involved, CDOs believe there is considerable room for improvement in CEO engagement in philanthropy.

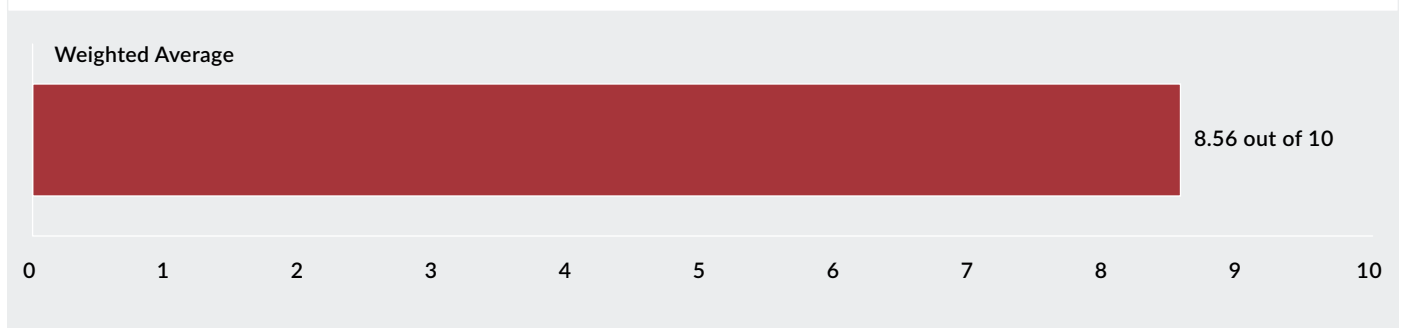
HOW MUCH CDOs BELIEVE THEIR CEOs TRUST THEM

7.12: How much CDOs believe their CEOs **trust** them



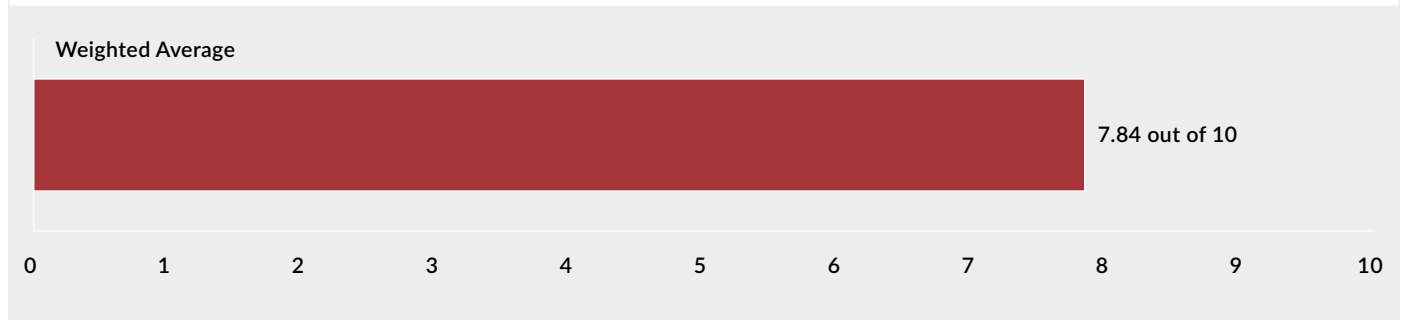
HOW MUCH CDOs BELIEVE THEIR CEOs RESPECT THEM

7.13: How much CDOs believe their CEOs **respect** them



HOW MUCH CDOs BELIEVE THEY AND THEIR CEOs SHARE A VISION FOR WHAT PHILANTHROPY MEANS AT THEIR ORGANIZATION

7.14: How much CDOs believe they and their CEOs share a vision for what philanthropy means at their organization



WHAT CDOs THINK THE IMPORTANT ELEMENTS ARE IN SUCCESSFUL CDO-CEO RELATIONSHIPS

The following table lists, in descending order by weighted average, the elements which CDOs identified as being important in a successful CDO-CEO relationship.

7.15: Important qualities of successful relationships	CDO Rating
CDO and CEO are open and transparent with each other, even when it is difficult.	9.50
CDO uses the CEO's time efficiently.	9.46
CDO has a seat at the executive leadership table when institutional strategy is being established.	9.43
CDO understands how philanthropy fits in the larger picture of the organization's operations.	9.42
CDO and CEO have a shared vision of philanthropy for the organization.	9.35
CDO delivers on fundraising goals for the organization.	9.29
CDO meets regularly with the executive leadership team.	9.18
CDO treats building a relationship with the CEO similarly to building a relationship with a donor.	9.12
CEO regularly commits time to fundraising activities.	8.87
CDO leverages relationships with other executive leaders to influence the CEO when necessary.	6.45
CDO and CEO share the same portfolio of donors.	5.95
CDO doesn't express disagreement with CEO in order to reduce potential conflict.	5.02

COMPARING POSITIVE AND NEGATIVE/NEUTRAL RELATIONSHIPS

8.00: Quality of CDO-CEO relationship

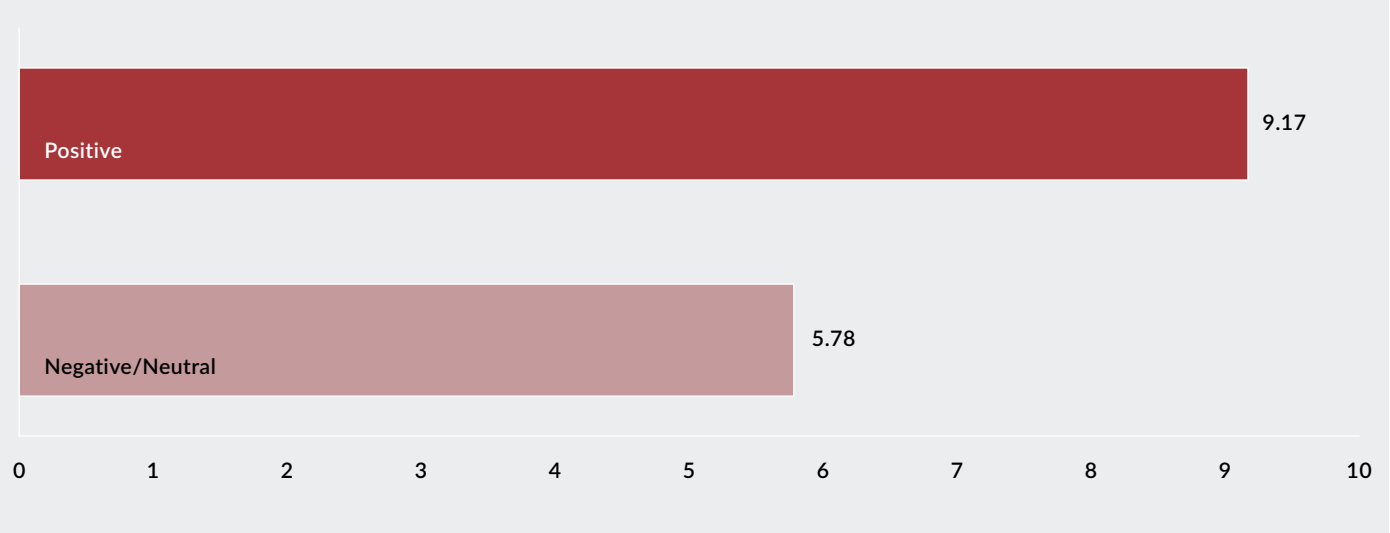
Negative	1.67% of organizations
Neutral	20.83%
Positive	77.50%

Due to the small percentage of truly negative scores reported, for the purposes of identifying real differences in results, we have combined the bottom two groups into a negative/neutral category.

The following is a discussion comparing and contrasting the results of these two groups in the study.

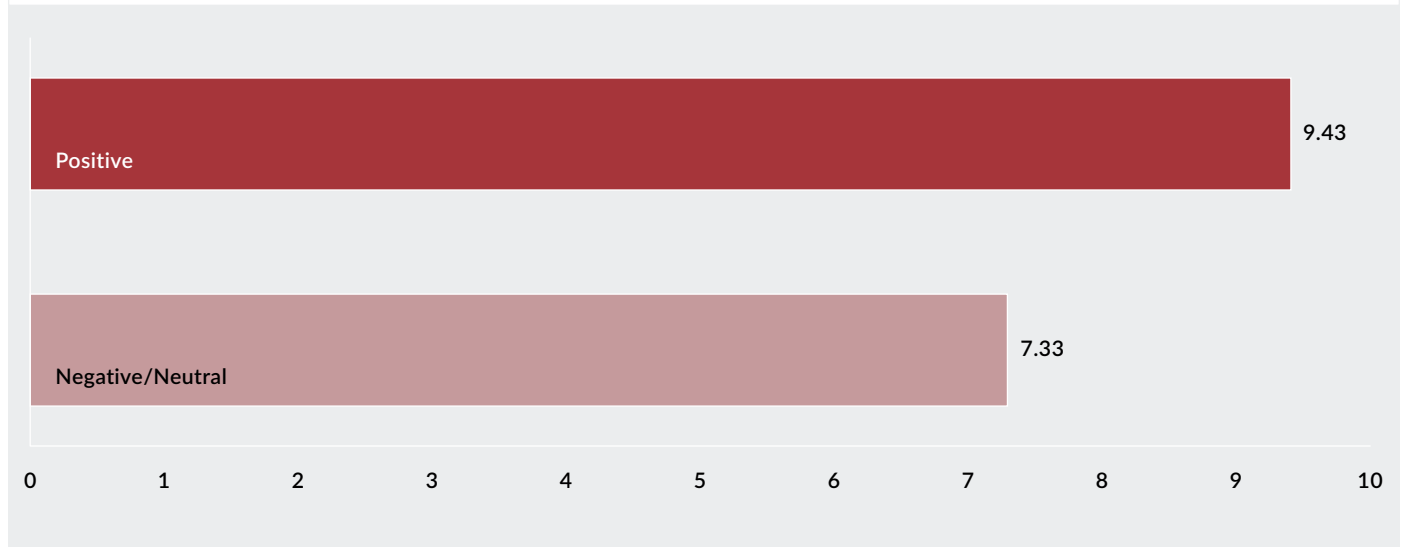
OVERALL CDO-CEO RELATIONSHIP SCORE

8.01: Overall CDO-CEO relationship score



LEVEL OF RESPECT CDOs HAVE FOR THEIR CEOs

8.02: Level of respect CDOs have for their CEOs



TYPE OF HEALTHCARE ORGANIZATION

The study found that CDOs who worked within a healthcare system report better relationships than those at stand-alone hospitals/medical centers.

8.03: CDO-CEO relationship based on type of organization

Positive Group		Negative/Neutral Group	
Stand-Alone Hospital/Medical Center	29.03%	Stand-Alone Hospital/Medical Center	44.44%
Healthcare System	53.76%	Healthcare System	33.33%
Children's Hospital	1.08%	Children's Hospital	0.00%
Other	16.13%	Other	22.22%

WHO IS RESPONSIBLE FOR HIRING CDOs

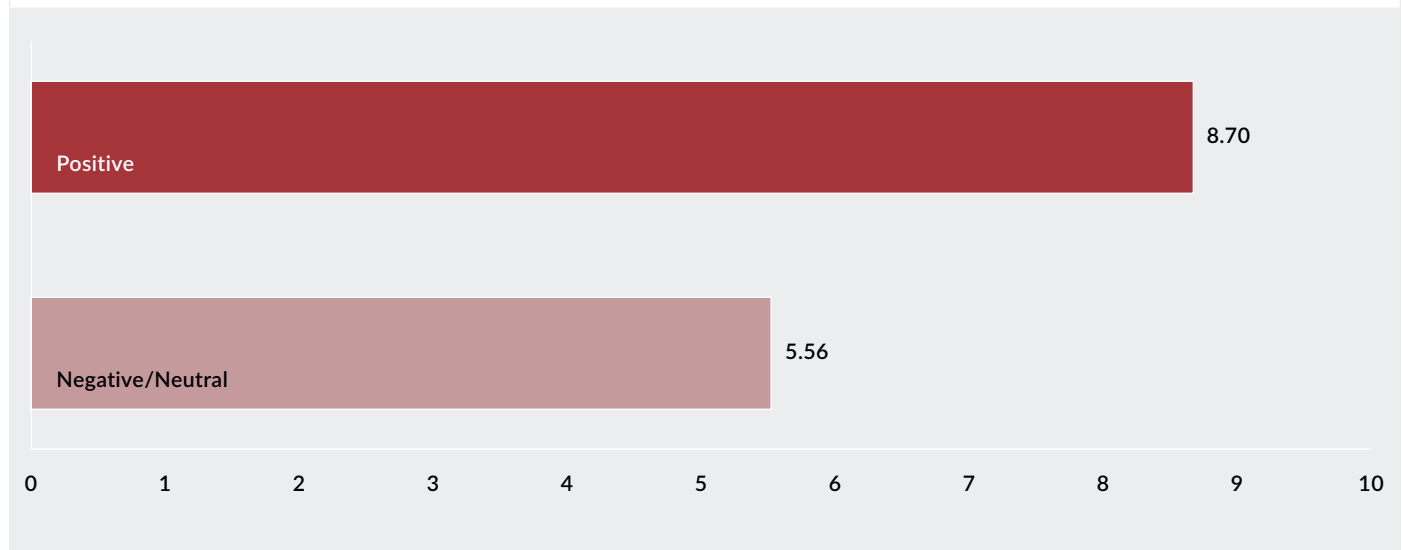
Our results suggest that when the CDO was hired by the CEO, he or she was far more likely to report a positive relationship.

8.04: CDO hiring responsibility

Positive Group		Negative/Neutral Group	
Hospital/System CEO	65.50%	Hospital/System CEO	33.33%
Foundation CEO	5.38%	Foundation CEO	7.41%
Foundation Board	6.45%	Foundation Board	22.22%
Other	22.58%	Other	37.04%

QUALITY OF COMMUNICATIONS BETWEEN CDOs AND CEOs

8.05: Quality of communications between CDOs and CEOs



INFORMAL MEETING/TALKING FREQUENCY

Our results demonstrate no significant difference between the two groups for formal meeting frequency, but those with positive relationships have far more frequent informal communications, with three times as many leaders in the positive group reporting “more than once a week.”

8.06: Informal meeting/talking frequency

Positive Group	% of CDOs reported	Negative/Neutral Group	% of CDOs reported
Daily	12.90%	Daily	3.70%
More than once a week	29.03%	More than once a week	11.11%
Once a week	31.18%	Once a week	37.04%
Twice a month	18.28%	Twice a month	11.11%
Once a month	7.53%	Once a month	33.33%
Once a quarter	0.00%	Once a quarter	3.70%
Once a year	1.08%	Once a year	0.00%



CEOS' PREFERRED METHOD OF COMMUNICATION

Face-to-face meetings are by far the most preferred method of communication in positive relationships, with negative/neutral relationships relying on email. Also of particular note is the massive difference for the answer "unknown." If a CDO does not know the CEO's preferred method of communications, they almost certainly do not have a positive working relationship.

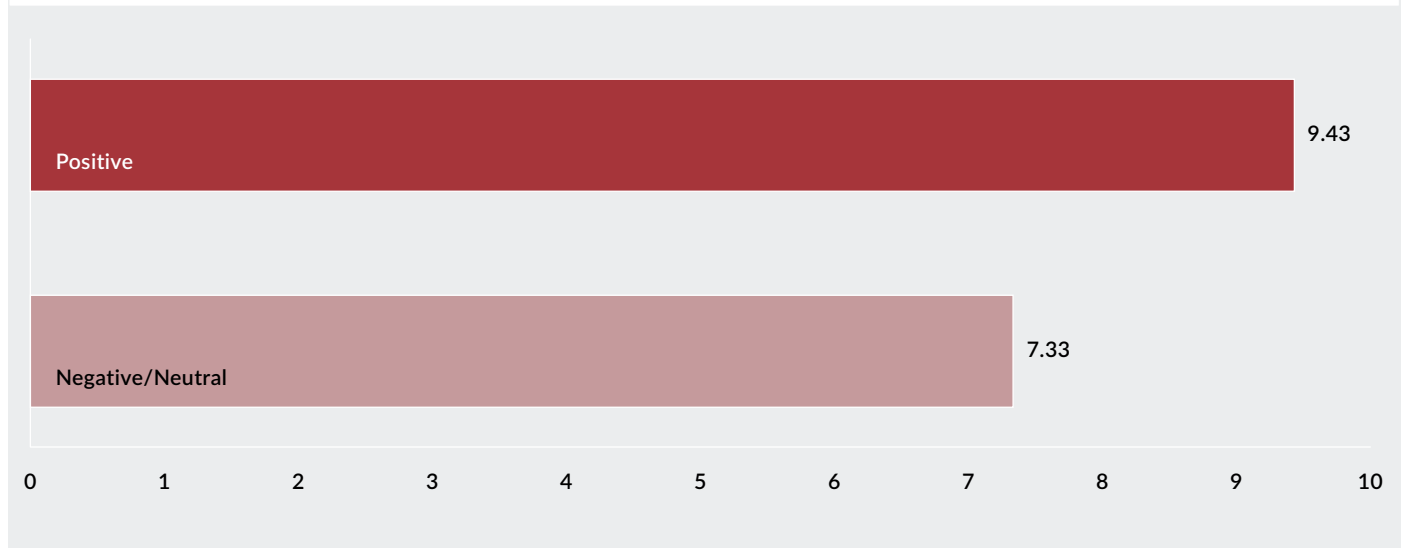
8.07: CEOs' preferred method of communication

Positive Group		Negative/Neutral Group	
47.31%	Face-to-face	29.63%	Face-to-face
30.11%	Email	40.74%	Email
8.60%	Phone call	0.00%	Phone call
7.53%	Text	11.11%	Text
4.30%	Other	0.00%	Other
2.15%	Unknown	18.52%	Unknown

CDOS' LEVEL OF CONFIDENCE IN ENGAGING WITH THE EXECUTIVE SUITE

On fundraising topics, there was no significant difference between the two groups, but regarding engaging executives on non-fundraising topics, the positive group scored far higher than the negative/neutral group.

8.08: CDO's level of confidence in engaging with executives about non-fundraising topics



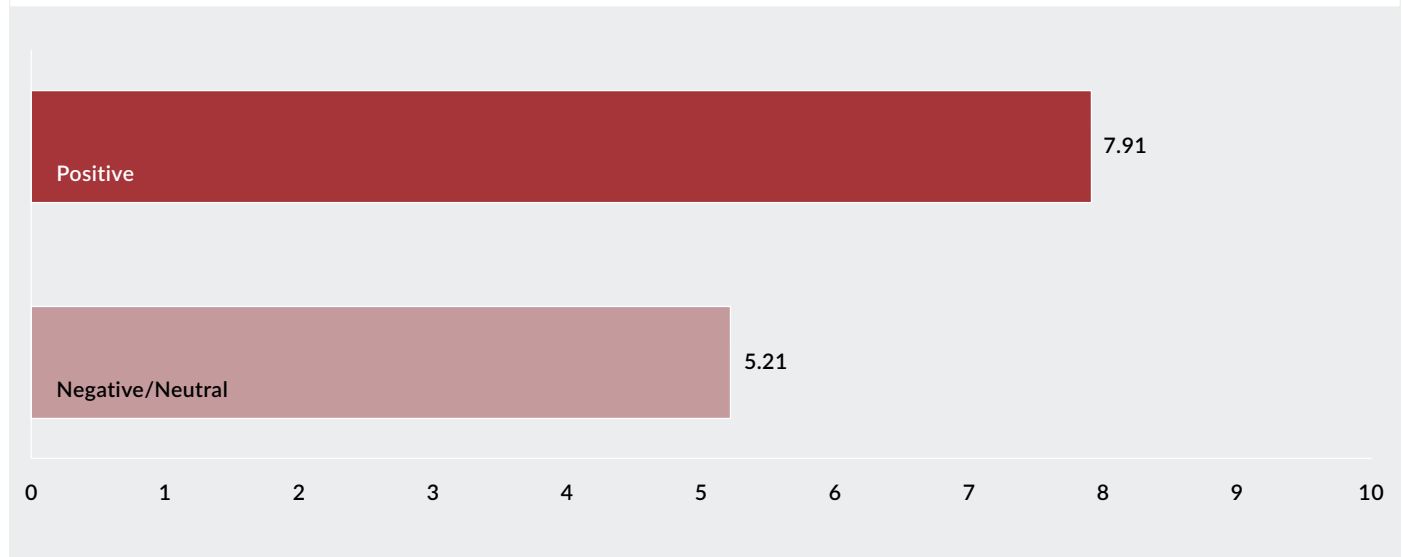
CDOS' LEVEL OF OPERATIONAL KNOWLEDGE

Results demonstrated that the positive relationship group was more likely to have a relatively high degree of operational knowledge, with an average score of 7.93 (higher than the non-weighted average of 7.74). Meanwhile, the negative/neutral group rated their operational knowledge almost a full point lower, with an average score of 7.07.

HOW MUCH CDOs BELIEVE THEIR CEOs UNDERSTAND ABOUT PHILANTHROPY

A clear correlation was evident between the CDO's perception of the CEO's knowledge of philanthropy and the success of the working relationship.

8.09: How much CDOs believe their CEO understands about philanthropy



HOW MUCH CDOs BELIEVE THEIR CEOs UNDERSTAND ABOUT VARIOUS PHILANTHROPIC TOPICS

8.10: How much CDOs believe their CEOs understand about various philanthropic topics

Positive Group	CDO Rating	Negative/Neutral Group	CDO Rating
The donor development process	6.98	The donor development process	4.38
The amount of time required to secure a major gift	6.58	The amount of time required to secure a major gift	3.96
Major gifts strategy	6.58	Major gifts strategy	3.92
Events fundraising strategy	6.48	Events fundraising strategy	4.71
Annual giving strategy	5.80	Annual giving strategy	4.00
Matching philanthropic passions to organizational initiatives	7.22	Matching philanthropic passions to organizational initiatives	4.58
Fundable priorities	7.08	Fundable priorities	5.67



CEO'S BACKGROUND

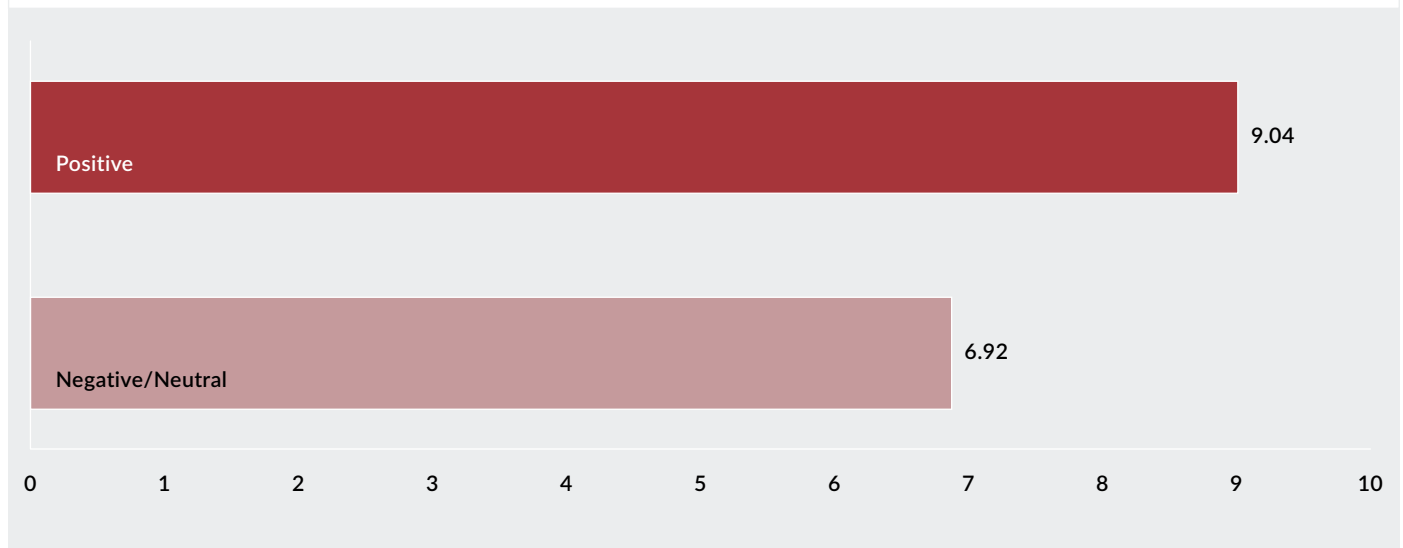
From comparing the two groups, two patterns were apparent in the data: in positive relationships, there are twice as many former doctors as corporate executives; and in the negative/neutral group, there were proportionally twice as many former corporate executives than doctors.

8.11: CEO's background

Positive Group		Negative/Neutral Group	
16.30%	Doctor	8.33%	Doctor
22.83%	Corporate Executive	41.67%	Corporate Executive

HOW MUCH CDOs BELIEVE THEIR CEOs RESPECT THEM

8.12: How much CDOs believe CEO respects them



OBSERVABLE CEO BEHAVIORS

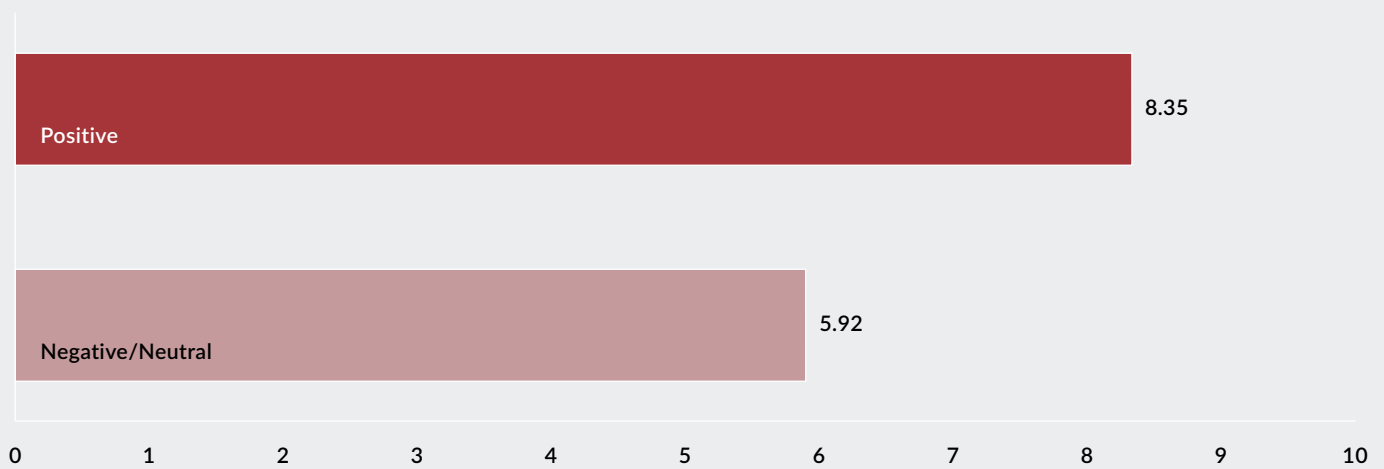
Certain behaviors were up to twice as prevalent in the positive group vs. the negative/neutral group, as seen below.

8.13: Observable CEO behaviors

Positive Group	% of CDOs reported	Negative/Neutral Group	% of CDOs reported
Listens to CDO's opinions	89.13%	Listens to CDO's opinions	36.36%
Requests CDO's opinions	76.09%	Requests CDO's opinions	36.36%
Accepts CDO's feedback on fundraising topics	93.48%	Accepts CDO's feedback on fundraising topics	54.55%
Assigns important tasks to CDO	69.57%	Assigns important tasks to CDO	31.82%
Introduces CDO to VIPs	55.43%	Introduces CDO to VIPs	22.73%

HOW MUCH CDOs BELIEVE THEIR CEOs SHARE THE VISION FOR WHAT PHILANTHROPY MEANS AT THEIR ORGANIZATION

8.14: How much CDOs believe their CEOs share the vision for what philanthropy means at their organization



WHAT ELEMENTS CDOs REPORT AS MOST IMPORTANT IN SUCCESSFUL CDO-CEO RELATIONSHIPS

When asked to rate important elements in the CDO-CEO relationship, the positive relationship group rated all factors except two as higher than the negative/neutral group. In the following chart, outlined in red are the two factors that those in negative/neutral relationships rated higher than those in positive relationships.

8.15: Factors in a successful CDO-CEO working relationship

	Weighted Average		Difference
	Positive	Negative/Neutral	
CDO and CEO are open and transparent with each other even when it is difficult	9.63 out of 10	9.00 out of 10	0.63
CDO uses the CEO's time efficiently	9.60	8.91	0.69
CDO has a seat at the executive leadership table when institutional strategy is being established.	9.56	8.96	0.60
CDO understands how philanthropy fits in the larger picture of the organization's operations	9.59	8.78	0.81
CDO and CEO have shared vision of philanthropy for the organization	9.47	8.91	0.56
CDO delivers on fundraising goals for the organization	9.36	9.00	0.36
CDO meets regularly with the executive leadership team	9.27	8.83	0.44
CDO treats building a relationship with the CEO similarly to building a relationship with a donor	9.25	8.61	0.64
CEO regularly commits time to fundraising activities	9.01	8.35	0.66
CDO leverages relationships with other executive leaders to influence the CEO when necessary	6.30	7.04	-0.74
CDO and CEO share the same portfolio of donors	6.14	5.26	0.88
CDO doesn't express disagreement with CEO in order to reduce potential conflict	4.77	5.96	-1.19

THE ROLE OF CMOS AND CNOS

Whereas there was little to no difference between the two groups for all other healthcare executives CDOs worked with (e.g., CFO, COO, CXO, etc.), there was a pronounced difference in that the positive relationship group was far more likely to work closely with CMOs and CNOs.

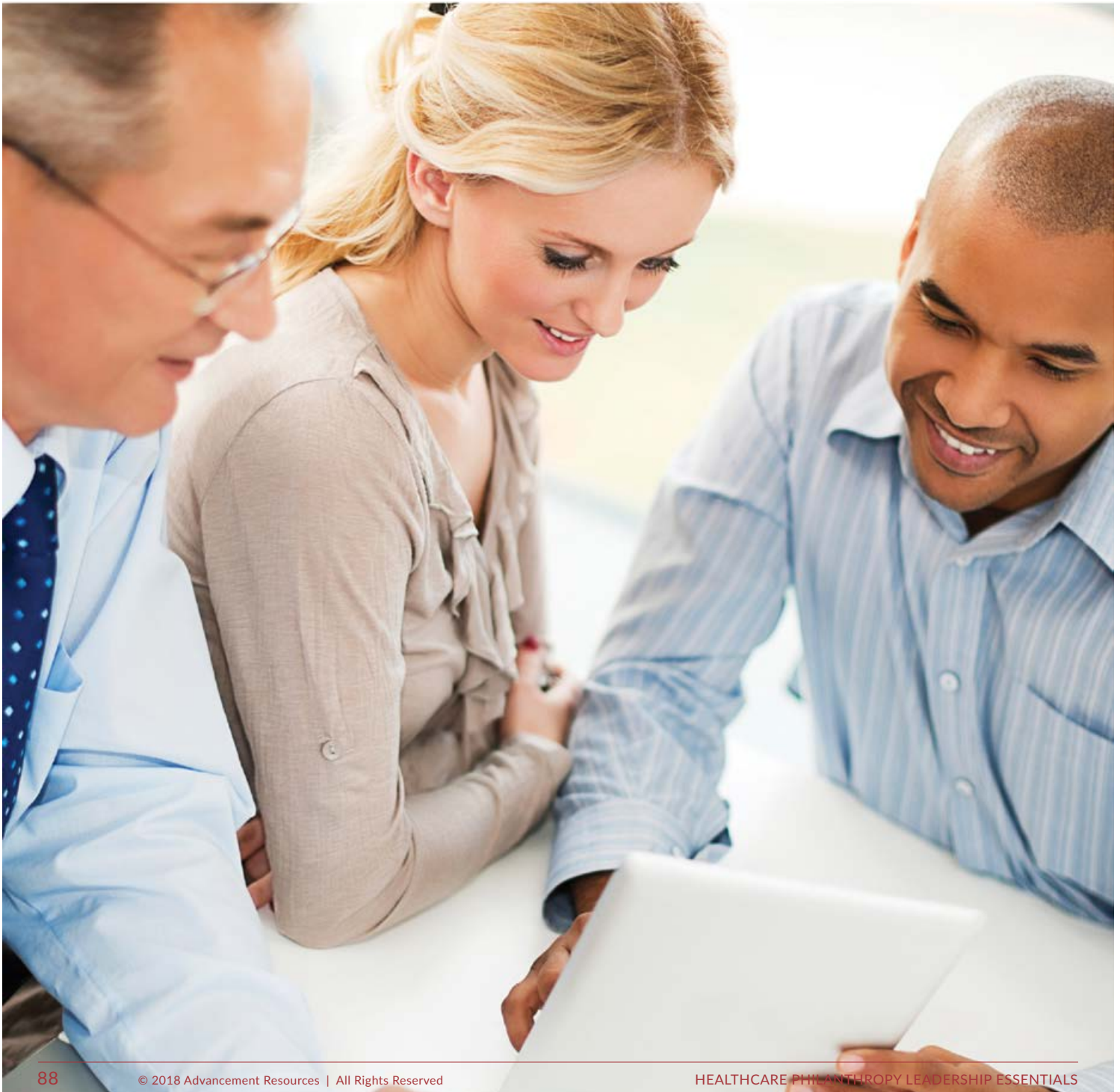
61.96% of those in the positive relationship group reported working closely with CMOs, compared to only **28.57%** of the negative/neutral group.

65.22% of those in the positive group reported working closely with CNOs, compared to only **42.86%** of the negative/neutral group.

FACTORS WHERE NO DIFFERENCE WAS OBSERVED

When comparing and contrasting the positive and negative/neutral groups, the following factors had little or no significant difference between the two groups:

- CDO title
- To whom the CDO directly reports
- Formal meeting frequency
- Whether the CDO maintains a donor portfolio
- Level of confidence in engaging executives on fundraising topics
- Length of CEO tenure





SUMMATION



REPORT METHODOLOGY

Beginning in early 2017, Association for Healthcare Philanthropy (AHP) and Advancement Resources embarked upon a joint study to address a central question:

“What are the essential qualities of strong working relationships in the executive suite in healthcare philanthropy?”

In particular, our research aimed to collect data related to several topics:

- How satisfied are CDOs with their executive suite relationships?
- In those relationships most satisfactory, what are common practices?
- In those relationships least satisfactory, what are common practices?
- What strategies are used by CDOs to improve their relationships with CEOs?
- What behaviors signify successful working relationships in the executive suite?
- What are the most common problems inhibiting executive suite working relationships?

To answer this series of questions, Advancement Resources utilized AHP's broad member base to recruit volunteers to participate in qualitative and quantitative phases of research. Advancement Resources also interviewed a sampling of ten CEOs whose participation was solicited based on existing professional relationships with Advancement Resources or AHP. Participants came from a variety of organizations, including community hospitals, academic medical centers, children's hospitals, and healthcare systems.

Over 30 hours of interviews were conducted via telephone. These were transcribed and extensively analyzed by the Advancement Resources research team. Based on the information derived from this qualitative phase of research, Advancement Resources designed and administered an extensive online survey of 30 questions, which was sent by AHP to its base of CDO members. Overall, more than 150 participants responded to the study, all voluntarily and randomly selected. All practical measures possible were taken to ensure that this sample was as representative as possible of the entire field of healthcare philanthropy within the logistical constraints we were under.

The online survey was then used to identify statistical inferences and patterns by segmenting the data and subjecting it to analysis.

Following the quantitative survey, Advancement Resources collected responses and analyzed the data, resulting in the identification of the Five Keys to Strong Working Relationships and their corresponding recommendations.



FINAL THOUGHTS

This study attempts to assist organizations in achieving their goals by promoting strong working relationships between CDOs and CEOs, which may be leveraged successfully to increase executive suite engagement. We sincerely hope you find the report useful and that you share it with your colleagues.

There are many avenues that can be considered for future research. Further topics that are essential to the establishment of a thriving culture of philanthropy include optimal development infrastructure and operations, development officer recruitment and retention, definition of strategic funding priorities, and emphasis on pipeline building through strategic engagement.

We are constantly seeking to advance our knowledge in this field and provide our partners and clients with the best possible research and data available. Please do not hesitate to contact us to discuss future research topic ideas or to see how you can contribute or participate in our ongoing research.

We believe that improving CDO-CEO relationships is critical to the success of all healthcare organizations, ultimately benefiting the people and communities who are served by our donors' philanthropic contributions. It is our sincere hope that this report can be leveraged to improve healthcare outcomes by increasing the power of philanthropy at organizations and communities across the world.





ADVANCEMENT RESOURCES

3349 Southgate Court SW
Cedar Rapids, IA 52404-5424

319.398.3376
319.366.8586 (f)

www.advancementresources.org



ASSOCIATION FOR HEALTHCARE PHILANTHROPY

313 Park Ave., Suite 400
Falls Church, VA 22046

703.532.6243
703.532.7170 (f)

www.ahp.org