



Tools You Can Use

Toolkit and Tips:

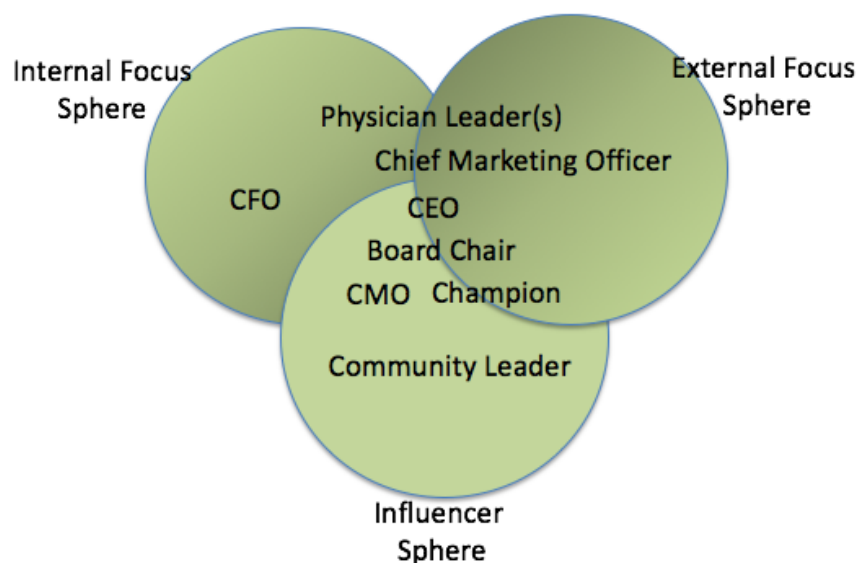
Step-by-Step Guide for Creating Your
Philanthropy Dream Team

Philanthropy Leadership Dream Team

Good teamwork is essential to optimal performance in business, hospitals and non-profits, or just about any other pursuit in life. The benefits of people working together apply not only to the organization's success, they also extend to individual team members: creating shared values and mutual support, as well as generating a sense of belonging and loyalty. These are all important building your dream team of philanthropy leaders.

Powerful teams require deliberate, intentional work and planning. Designing and creating an effective team is not something that can just be developed over the course of a retreat. The team's work and their unique partnerships must regularly be revisited, evaluated and realigned. Teams are organic and the plan to support their work must reflect this dynamic nature, and be ready to change. Sometimes, your work will primarily be externally focused, other times, it will need to carry a heavy dose of internal work and partnerships. Sometimes, you will need to depend on influencers to accomplish goals. Make sure you can turn to leaders on all fronts. So, let's dig in and explore how to build your dream team of philanthropy leaders!

Start by making a list of your ideal leadership team. As you do, think about where they fit on the Venn Diagram below. Prioritize your attention based on the needs of the program at any given time, either the: External Sphere, Internal Sphere or Influencer Sphere. Those in the center, require laser focus! The nature of the people on that list will vary depending on the character of your institution and your role at the institution. If I'm the Chief Development Officer at a hospital or hospital foundation, the list below captures the seven or eight people I want as partners on my philanthropy leadership dream team and the corresponding Venn Diagram.





- **The CEO** - The CEO is probably your most important partner. He or she must be a part of your team, in some way shape or form. That relationship will vary depending on the CEO's nature and comfort with philanthropy. If there's a problem, you've got two options:
 - Commit to fixing the relationship or
 - Find a very strong alternative leader (or two) who is a trusted and well-respected surrogate.High performing programs have a common characteristic. Very simply, philanthropy is amongst the CEO's top priorities and time commitments.
- **A Champion**- This may be an internal or an external leader who believes in the philanthropy program, serves as an advocate, and is there to lend an ear, help solve problems and champion the program internally and externally. This person helps, much like the CEO, to build your philanthropic culture. Nurture this relationship and never, ever take it for granted!
- **Board or Philanthropy Committee Chair** - It should go without saying that the board and/or philanthropy committee chair are essential team members. Hopefully, you have crafted a trusted relationship. They should be able to help navigate through external and internal waters, as well as serving in the all important influencer role.
- **The Chief Medical Officer** - A productive, trusted relationship with the CMO can be one of the most critical factors in helping to build trusted relationships with your physician partners. The CMO helps to provide access, can help steer you through challenging political waters, and most importantly, will help shape the philanthropic culture. If cultivated well, the CMO may serve as one of your most powerful allies. The ROI on the time spent with the CMO on philanthropy education, relationship building, and together fostering the philanthropic culture can be enormous.
- **The Chief Financial Officer** - Maybe an unsuspecting partner, but I have found that a CFO who values philanthropy can be a part of your secret sauce in the philanthropy program and an important internal ally. A little education goes a long way in helping achieve strong relationships with peers. Don't overlook this one. The CFO is also critical to your philanthropic strategic planning and should be a full partner in this effort.



- **Chief Marketing and Communications Officer** - The Chief Marketing Officer and his/her staff can be one of your most effective partners. There are real opportunities for win-wins between the philanthropy and communications functions. Philanthropy is all about communication and using communication strategically to build relationships with your donors and the community. Communications officers can help expand the tools in your toolkit and create important internal allies. Look for ways you can be stronger together. Identify

how the work in the philanthropy department positively impacts the marketing and communications functions. Some of the most powerful, successful and downright fun partnerships throughout my career have been with communications and marketing colleagues.

- **Physician Leader(s)** - This is someone who is a willing and adept partner and who may also have influence in the community, but certainly understands your internal and external environments. We need several voices within the physician group(s), for internal and external relationship building. Building a partnership with another influential physician (or two) who advocates for the philanthropy program will help magnify the work of a busy CMO. Ideally, s/he will provide additional alliances for others on the philanthropy staff. I recommend identifying and cultivating several physician partners with each frontline development officer. Soon, an even larger team of physician partners will be on board and the culture of philanthropy will begin to soar!
- **Community Influencer** - This person may serve as a quiet advisor to you and the program, providing insights into the perceptions of your community and the strength of your institution's image and brand. Seek them out and keep at least one on your dream team. You'll be amazed at what you learn, and even the doors opened!



Photo courtesy of BID- Milton Hospital

Congratulations! You've identified the ideal members of your dream team.
Below are nine tips for creating powerful partnerships:

1.) Know your team

What are their individual and collective strengths? What does each person uniquely bring to the table? Build relationships with them individually and as a group. Understand how they think. What are their concerns? How can you best utilize their value, while identifying others that can fill in the gaps?

2.) Nurture your champions

When things get tough, your champions will help to keep things moving forward, or provide you the motivation you need. Make a point of calendaring regular check in times with this person. Be intentional about this and do not take your champion for granted.

3.) Define roles

Make sure you understand the role plays. Write them down! Each team member needs to understand his/her role in philanthropy and the reason they are on the team. Tell each, "I'm counting on you on my philanthropy leadership dream team, and this is why....." What does each one bring to the table and what are your expectations? Be transparent. Ask them about their role in philanthropy and what they feel they can reasonably contribute. What's the value proposition for them?

4.) Build commitment

Build commitment to your shared goals for the organization. This requires lots of education. Support and trust are critical to the team's performance.

5.) Proactively provide feedback

Proactively provide feedback on the team's achievements collectively and individually. Make sure the entire team is aware of where the philanthropy program is going. What are the challenges, successes and opportunities? And, where and how can they help?

6.) Acknowledge contributions

Acknowledge contributions to achieving goals. Think of all the settings where your team's contributions can be acknowledged. Be careful that you are not the only one acknowledging the team's success. It can come from many corners, including the CEO!

7.) Celebrate successes!

Such an important lesson! The team needs to be able to celebrate the big and the little successes along the way. They need to understand the role they each played in that success.

8.) Evaluate, re-tool and course correct

Especially in a dynamic environment! No team is static. Organizations are fluid. Team members will come and go and roles may change. Your needs will change, whether that be the need for greater internal, external or influence focus. Set a regular time to evaluate, re-tool and course correct. Don't keep doing things the same old way. Be ready and open to change!

9.) Communicate, communicate, communicate!

Finally, communication is key to success. Be thoughtful and intentional. Observe what's happening with your team members. Don't assume all the team members are on the same page. Find various channels for communication. Rarely is over communication a fault. Assuming that goals and the road to achieving them are well understood can be a risky misstep.

Ultimately, your dream team will be instrumental in not only achieving the institution's philanthropic vision, it will also help create and sustain an enduring philanthropic culture. Most importantly, this is an opportunity for the team to feel deep gratification for the impact they are making on people's lives!

About the author:

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

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