

Managing Up:
Turning Your CEO into a Fundraising Rock Star

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Let's Get Into Your CEO's Head

What would your CEO want you to get out of this session?

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Take Aways from this Session

- Empower your apprehensive CEO to become comfortable fundraising
- Establish a positive partnership with your CEO
- Create a workable plan for your CEO at a pace that will result in success

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What is Managing Up?

A Definition:
Influencing someone with power over you.

Managing up requires general influence skills, relationship management, negotiation techniques and working well with others.

High Performance Group, Inc.:
 The Courage to Manage Up

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Managing Up is ...

"The process of consciously working with your boss to obtain the best possible results for you, your boss and your organization.

This is not political maneuvering or kissing up. Rather, it is a deliberate effort to bring understanding and cooperation between individuals who often have different perspectives."

"Managing Up", Thomas Zuber and Erika James

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How Much of the Day Does your CEO Spend on Fundraising?

- 0 – 25% of time
- 26 – 50% of time
- 51 – 75% of time
- 76 – 100% of time

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The Average CEO spends **under 5%** of time on individual fundraising ...

A prescription for disaster!

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The engine that runs most non-profits is ...

FUNDRAISING

Then shouldn't your CEO be spending the better part of their workday on this function?

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Most CEOs would rather have a root canal than make a solicitation call on a wealthy prospect!



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Are You Living Up to Your Fundraising Responsibilities?

Questions for the CEO:

If you are the CEO, you ought to be able to answer "yes" to all the following questions:

- Is fundraising part of your job description?
- Do you, your development department, and your board work as a fundraising team?
- Do you go out on solicitation calls frequently?
- Do you keep your development staff informed about what's going on throughout your organization?



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Are You Living Up to Your Fundraising Responsibilities?

Questions for the CEO:

If you are the CEO, you ought to be able to answer "yes" to all the following questions:

- Do you meet with your development staff regularly?
- Do you work with your board and development staff in making presentations to foundations and corporations?
- Do you consider fundraising to be a key part of your job?
- Do you set a positive fundraising tone for your whole organization?



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Are You Living Up to Your Fundraising Responsibilities?

Questions for the Development Professional:

If you are the development director, you ought to be able to answer "yes" to all the following questions:

- Do you make it clear exactly what fundraising tasks you want your CEO to perform?
- Do you let the CEO know when you need help making a contact or motivating a board member?
- Do you provide a written list of fundraising duties for the CEO and a timetable outlining when each should be done?
- Do you meet with the CEO regularly to report on fundraising activities and CEOs?



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Are You Living Up to Your Fundraising Responsibilities?
Questions for the Development Director:

- If you are the development director, you ought to be able to answer "yes" to all the following questions:
- ___ Do you respect the CEO's time constraints and understand that fundraising is only one of many CEO duties? At the same time, do you continually reinforce the importance of fundraising for the CEO?
- ___ Do you brief the CEO on potential donors and the best way to solicit them?
- ___ Do you treat the CEO as a crucial member of your fundraising team?
- ___ Do you give the CEO written reports at the end of each fundraising event and campaign?

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Are You Living Up to Your Fundraising Responsibilities?
Questions for the Development Director:

- If you are the development Director, you ought to be able to answer "yes" to all the following questions:
- ___ Do you take the time to help the CEO become more and more comfortable with the role of asking for money?
- ___ Do you act as a fundraising coach and educator for the CEO?

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Do you take the time to help the CEO become more and more comfortable with the role of asking for money?

SOMETIMES EVEN SIMPLE TASKS CAN BE FRUSTRATING.

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Begin with simple tasks and work your way up



Solicitation visits

Advice visits with prospective donors

Stewarding visits with current donors

Thank you notes - Thank you calls

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Schedule Weekly Check-In Meetings

Who attends?

- Development Director
- CEO
- The person who manages the CEO's schedule

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What A Development Director Should Bring to Every Meeting

- ✓ Fundraising Dashboard
- ✓ Special Events
- ✓ Staff Update
- ✓ Development Director Ask List
- ✓ CEO Ask List



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Do you act as a fundraising coach and educator for the CEO?

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Do you act as a fundraising coach and educator for the CEO?

Things you need to accomplish the tasks:

- ✓ Skill
 - Knowledge
 - Experience
- ✓ Will
 - Motivation
 - Confidence

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Embrace YOUR Mission

- Your job is to **support** your CEO's success. That's what you were hired to do!
- CEO's don't want people on their team who drag them down. They look for people to **make them look like rock stars**.
- Understand and accept this as your mission.

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Next Steps: What's Your Plan?

- Step 1: _____
- Step 2: _____
- Step 3: _____
- Step 4: _____





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Successful fundraising happens when the Development Director and the CEO become an **"us."**

Joan Gerry





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QUESTIONS?







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