

Here are some helpful tips as you seek alignment with leadership:



- **Manage Expectations of the C Suite, Physicians and Administrative Leaders:** Our most important allies know very little about what we do every day, so we need to clarify our capabilities. For example, if the hospital president calls you in with Dr. X to discuss raising money for the Dr's favorite project, you may leave there with them thinking you are on the hunt for donors and believe the goal is possible. Before agreeing to raise \$X for the project, explain you want to put a plan together and develop a qualified prospect list. You can't conjure up interested donors if they do not exist, but hospital

leadership doesn't know that.

- **If all money is fungible, you should focus on the areas with the most prospect capacity:** Talk through the fundraising priorities of the hospital with leadership and share data on where the prospects are already engaged/interested. For example, if the hospital wants to raise \$X for something a bit obscure but you have the best prospects in cancer, perhaps they would fund the obscure project with the hospital budget and let you raise the funds for the cancer center's priorities. Aligning fundraising priorities with your prospects' interests is critical to success.
- **"Show Your Work" and don't assume C Suite understands our world:** It is often difficult for healthcare administrators and clinical leaders to understand the sequence and cadence of our work—especially when it comes to major and principal gift cultivation and solicitation. You will achieve greater alignment with the C Suite, physician leaders and service line leaders if you share your process along the journey. Start with sharing a pipeline of interested prospects and updating the leadership on the progress each is making. Keep showing the pipeline and share updates, including new prospects added, changes in status and highlighting gifts that have closed and for what purpose. The time it takes wealthy prospects to make decisions is often a mystery to those outside of our field. Keep the stakeholders updated on the progress and expected next steps.
- **Involve C Suite and Physician Leaders in the cultivation process:** In our experience, healthcare leaders are more aligned when they have been in on the strategy development and meet with prospects during the process. When potential benefactors tell them what they care about, it sticks much better than when we do. Of course, you should use these leaders' time very strategically. Be sure you have them involved with prospects who are well qualified and who have agreed to hear more about a specific project or program. Share a briefing with the leader in advance with background on the prospects, summaries of past discussions, expected outcomes from the meeting and talking points. Debrief afterwards and continuously improve the process.

Achieving C-Suite Alignment with Philanthropy

- **Be sure you have agreement on costs and timing.** You may hear from a physician or administrative leader that they would like to fund x piece of equipment or y program with current use funds. If you charge ahead with the cost they give you, you may find yourself crossways with the CFO down the road, because the estimate from the equipment vendor was out of date or the program cost didn't fully include fringe benefits for staff, etc. Work through the process that the finance team uses for budgeting and cost analysis. Also, secure agreement on how much of the funds will need to be in cash to buy the equipment or launch the program. We are accustomed to multi-year pledges but cash flow is a major issue for administration.
- **Make sure the C Suite and all key stakeholders are “In on the Win”:** Along the way, be sure you ask the CEO or other leader who is running point, “who else needs to be involved and briefed on this potential gift?” Be sure you consult the matrixed org chart of the hospital or system to be sure you include everyone. It's a terrible feeling when the Director of Nursing tells you she just heard of this project that affects her when it was announced publicly. When you have all stakeholders engaged and updated, you will find better alignment. Instead of you or the Foundation leader announcing the gift, have the CEO or applicable leader communicate it and share the work the Foundation. If the CEO reports on philanthropy as part of their regular communications, you will be much better integrated and aligned. **Finally, keep your leaders in on the stewardship effort.** A follow-up phone call, email or meeting with the donors to share the impact of their will be well-received and cement alignment.

By John A. Perry, CFRE President and Principal Consultant