

four ways to ensure fundraising success during leadership transitions



1. ensure a smooth transition

- **View through an optimistic lens:** change presents opportunities
- **Exude confidence:** the positive things about your institution before your leader departed remain positive
- Leverage your leader's **personal capital** before their departure
- Celebrate outgoing staff and **communicate proactively**
- Consider the opportunity for an **introductory tour**



2. build a fundraising pipeline

- Emphasize the **relationship with the institution**, not an individual
- Build a **culture of philanthropy:** ensure that donors have multiple points of contact, consider a co-assignment when appropriate, and incentivize development officers to collaborate
- Focus on relationship-building, **growing capacity** through continued qualification and cultivation efforts



3. retain talented fundraisers

- Hire for **cultural fit** and **job alignment**
- Focus on a **culture of philanthropy**
- Ensure younger staff are **mentored** and have **growth opportunities**
- Set **realistic goals and metrics**, using a collaborative approach



4. maintain momentum

- Focus on **phase-appropriate planning** and engage campaign counsel
- Maximize **leadership and campaign cabinet visibility**
- Train volunteer leaders in **major gift solicitation best practices**
- Use the campaign as an **attractive recruiting tool** for a new development leader

A Client Story: Success factors at The Elisabeth Morrow School

First, do no harm

Resist the desire to fix everything – it may be wiser to delay difficult decisions until a new leader is on board.

Bridge past, present, and future

Value the traditions of the institution and qualities of the former head, but open your community to new ways of thinking.

Train the board

Help the board adapt to the idea that the new leader will likely have a different approach and encourage them to focus on its own professional development and self-evaluation.

Heed respected leaders

The administrative team is in the best position to guide you in what must be done versus what can wait, but identify when personal agendas are influencing this thinking.

Keep asking!

Understand the temptation of others who view an interim year as an opportunity to let up on initiatives underway. Encourage them forward in order to maintain the momentum!



Graham-Pelton