

CEO/CDO Partnerships That Supercharge Fundraising

Neil Gordon, Discovery Museum

Marie Beam, Discovery Museum

Krishna Kabra, San Diego Children's
Discovery Museum

Heather Disher, San Diego Children's
Discovery Museum

Jane Bard, the Children's Museum of New
Hampshire

Monique Deforge, the Children's Museum of
New Hampshire



Meet the Panel

Discovery Museum, MA



Neil Gordon
CEO

Marie Beam

Chief Development Officer

San Diego Children's
Discovery Museum, CA



Krishna Kabra
CEO



Heather Disher

Director of Advancement

the Children's Museum
of New Hampshire, NH



Jane Bard
CEO



Monique Deforge

Director of Development

Two on a Crayon Activity

Partner up!





Agenda

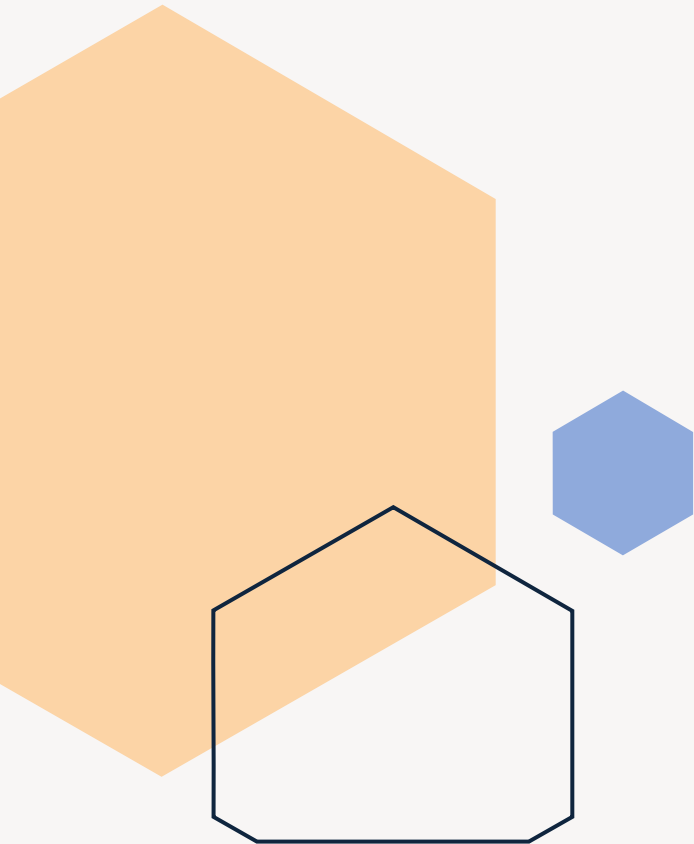


As we walk through the cases...

What are your observations?

What are you surprised about?

What questions do you have?





Case #1: Individual Donor

- Former Board member, donor since 1991
- 1991-2014: \$1,200-5,000/year
- Indications of larger capacity, some interest
- Lack of quality, contemporary experience with the Discovery Museum
- Passion for da Vinci
- Secondary passion for STEM experiences for older kids
- Lots of experience being a donor

Case Study #1: Individuals



Roles

- CEO: Negotiating the vision, spoonfeeding big ideas, respecting donor passion, engaging museum staff; reinforcing role of CDO
- CDO: Listening, affirming, delivering on promises, professionalizing communications, advocating for the donor internally



Characteristics

- Relating to the donor separately and as a team
- In sync behind the scenes but supporting the donor in questioning possibilities, practices, outcomes
- Bridging program staff transition; consistency
- No ego



Tactics

- Be available
- Listen and be curious to build trust
- Tag-team
- Pause: affirm concerns before responding to them
- Steward
- Don't rush it – let the relationship evolve
- Make sure the donor meets you at least halfway



Case #2: Corporations

Navigating a new CEO/CDO relationship

Background:

- Previous but sporadic history of support
- Includes financial support and employee engagement
- Range: \$5k-\$10k

Request:

- STEM Educational Kits with a local food bank: \$50k, volunteers, and physical space... all within a 2 month timeline.

Case Study #2: Corporations



Roles

CEO: Share the vision with the funder, support CDO, manage internal feelings

CDO: Communicate needs and progress, coordinate internal and external logistics



Characteristics

- Open communication
- Trust
- Empower and steward others toward a shared vision
- Playing to strengths



Tactics

- Meetings, meetings meetings!
- Assign internal leads
- Let the funder self assign their role(s)
- Overly communicate to all involved
- Tough conversations around risks and challenges



Case #3: Grants

Success in receiving an IMLS Inspire grant in 2019

Making the decision to apply in 2021

- Having a compelling reason to apply
- Clear understanding of process and how to manage a federal grant
- Set realistic expectations
- Engaging staff in decision making

Why it worked

Case Study #3: Grants



Roles

CEO: gives insight into vision and priorities for grants, engages stakeholders to support strategic priorities, provides application feedback, builds relationships with grantors

CDO: maps grants to needs, builds relationships with grantors, manages grant workplan, coordinates grant applications, deliverables and reports, engages staff in process



Characteristics

- Shared vision
- Trust
- Shared ownership
- Respect
- Commitment of time
- Shared worry burden



Tactics

- Building consensus
- Sharing workload focused on strengths
- Organization and orchestration
- Communication and collaboration
- Analyzing benefits and burdens
- Risk-taking

Q & A Session

To submit your questions,
Visit [Slido.com](https://www.slido.com) or scan the QR code



Enter the code:
#3528748



A Tool for Discussion

How do you evaluate partnership?



CEO/ED and CDO/DOD each fill out the tool

- To whom is your relationship visible?
- Who does it affect?
- How do you describe your partnership?
- In what areas is it most/least productive and effective?



Then compare notes and discuss

- What do you most agree on?
- Where do your perspectives most differ?
- What small steps could lead to big change?
- What are some ways to make discussion about the relationship a more regular part of working together?

A Tactical Framework

How do you evaluate roles and responsibilities?

	All responsibilities	CEO/ED	CDO/DOD
STRATEGY and GOAL-SETTING	<ul style="list-style-type: none"> • Provides vision and direction for the museum • Provides financial strategy and oversight for the museum • Oversight of Development Committee • Sets fundraising goals • Designs Development strategy 		
INDIVIDUAL & CORPORATE PROSPECT IDENTIFICATION	<ul style="list-style-type: none"> • Identifying and qualifying prospective donors • Prospect research 		
GRANT IDENTIFICATION & MANAGEMENT	<ul style="list-style-type: none"> • Identifying potential grants • Conducting grant research (potential \$ amounts, organizations funded, giving priorities) • Grant application strategy • Analyze and assess how grant can help organization meet strategic plan goals • Engaging staff in completion of grant-funded initiatives • Participation in meetings with grantors 		
PROSPECT & DONOR ENGAGEMENT	<ul style="list-style-type: none"> • Engagement strategy and meetings • United front for staff in presenting funding priorities • Engage staff to build a strong case for support 		
EVENTS	<ul style="list-style-type: none"> • Event strategy • Event design • Event implementation • Roles during events 		
INDIVIDUAL & CORPORATE SOLICITATION, NEGOTIATION, STEWARDSHIP	<ul style="list-style-type: none"> • Initiating donor meetings • Briefing/prep • Participating in meetings/roles during meetings 		

Thank you!

Handouts:

