



collins group
a division of
Campbell & Company

The Terrific Trio: How the CDO/CFO/CEO partnership can succeed

BECAUSE **YOUR MISSION** MATTERS

Who are we?



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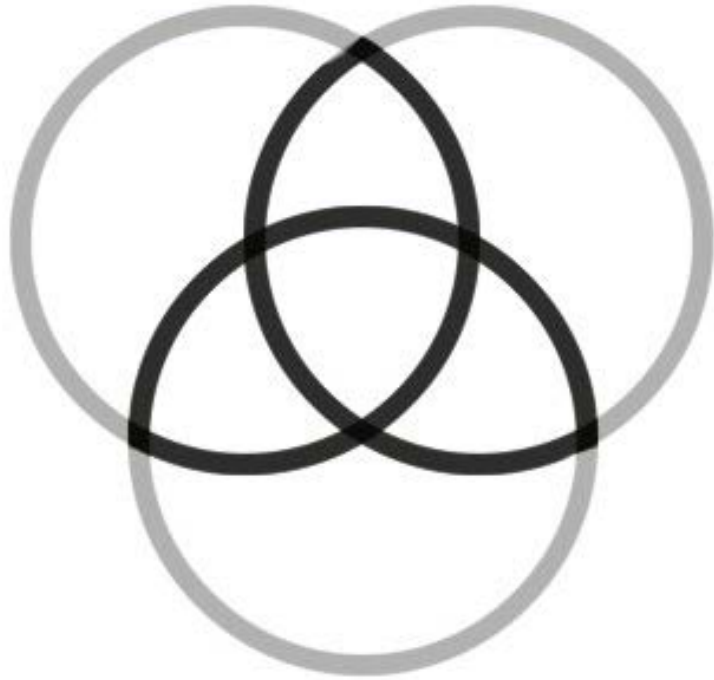
What we will cover today

- The challenges AND potential inherent in this partnership
- Typical pitfalls and how to avoid them
- What successful partnerships look like
- How to build the strongest possible relationships

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Why is the relationship important?



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Role of CDO

- Primary fundraiser, and much, much more!
- Relationship builder
- Creator and shaper of culture of philanthropy
- Strategist and planner
- Diplomat

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Role of CEO

- Has a strategic vision for the organization
- Understands and supports appropriate infrastructure and organization's financials
- Creates the organizational culture and helps to promote culture of philanthropy
- Most visible face of the organization
- A leader as well as a partner



Role of CFO

- Has finance/accounting responsibilities
- Understands the business model of the organization and helps with strategy
- Deals with contracts
- Works with finance committee and/or board
- Maximize use of funds for mission and values



The challenges and potential

- Tensions between CDO/CEO, CDO/CFO
- Unrealistic fundraising expectations and insufficient culture of philanthropy
- Different understanding and perspective of organization's financial health
- Creating opportunities between CDO & CFO



Typical pitfalls and how to avoid them

- Plan vs reality
- Roles and approaches/accountability



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What successful partnerships look like

- Trust
- Communication
- Partnerships
- Relationships
- Courage



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How to build the strongest possible relationships

- CEOs:
 - Right person in the right job – start from interview
 - Understanding each role
 - Involve appropriate leadership in strategic discussions and in holistic way
 - Set and share expectations on results, culture and goals



How to build the strongest possible relationships

- CFOs:
 - Learn about Development
 - Be a partner, supporter and cheerleader as well as business person
 - Maintain clear, regular, and open communications
 - Establish shared language and systems, and culture of partnership to jointly problem-solve



How to build the strongest possible relationships

- CDOs:
 - A facilitator and convener
 - Know and learn
 - other departments and organization's programs
 - what the CEO, CFO, Board, and rest of organization understands about development



In Recap...

- Understand each role
- Maintain clear, regular, and open communications
- Set goals together and share expectations
- Establish shared language and systems, and culture of partnership

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We're here for you

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Upcoming webinar:

Our next webinar will be in September 2014. Please check collinsgroup.com/presentations for details.

