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The critical role of physicians in fund development

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Thoughts on being a Successor



By Lois J. Gomez, M.P.A., CFRE



■ Lois J. Gomez, M.P.A., CFRE, is president of Netzel Grigsby Associates, Inc., Southwest. She began her fundraising career with the American Red Cross Los Angeles Chapter, moving to health care philanthropy as manager of a small hospital foundation. Most recently, she served as vice president, major gifts and chief operating officer at California Hospital Medical Center Foundation. Lois has been an instructor for both the UCLA and California State University at Northridge fundraising certificate programs.

Experienced and capable development professionals will have many opportunities to explore in the near future, as baby boomers come of age and a vast resource of long-time senior health care development professionals begin to retire. There are several key areas you should consider as a “successor” to ensure a smooth transition that will honor your predecessor’s legacy, while providing the building blocks to develop your own successful programs.

With baby boomers coming of age, there are limitless predictions of an all-out void of worthy candidates to fill the shoes of the tireless, dedicated workers who emerged from the tumultuous '60s and '70s as committed leaders and agents of changes.

In health care philanthropy the stakes are high. In 2007, \$23.15 billion was raised in the USA. How much of that

was raised either by, or directed by, a staff person over the age of 50? Probably a very large portion. These are the people we are losing to retirement—the experienced, the skilled, the long-time builders of development programs and practices.

Health care philanthropy leaders, partnering with volunteer leaders, are responsible for the greatest return on

investment (ROI) in most health care institutions today. There is no other revenue stream that consistently performs at such high rates of return. Hospital foundations are no longer the party givers and the raffle prize organizers. They are the sophisticated difference between a hospital being in the black as opposed to red at year-end; the difference between having state-of-the-art technology or not.

Chief development officers (CDO), who have successfully transitioned to a performance-based, profitable entity with low costs to funds, are filled with knowledge waiting to be imparted to those who will be their successors. As these very valuable, skilled financial development leaders begin to plan for retirement, finding the right successor to carry on and fulfill the dream or legacy is vitally important. The accomplished, retiring chief development officer is to be applauded for searching for the right person to carry on his or her

programs, for being willing to coach the successor, and for entrusting years of knowledge and good practices to the next in line.

Experienced, capable and resourceful professionals will have many opportunities to explore. Perhaps you will be that person who is tapped to succeed a health care development leader. You may or may not already be employed by the institution where the leader is leaving. If you do make the decision to accept a "successor" role, there are several key areas you should consider.

What does it mean to be the successor?

The very fact that the chief development officer has publicly and carefully chosen you speaks volumes of your capabilities, experience and overall qualities. Each time you are introduced or accompany the chief person publicly you will be perceived

as the first choice of succession. Most institutions will not allow an employment letter to include a guarantee that you will be the automatic successor when the head person leaves; however, the mere fact that you have been visibly selected will stand on its own merit.

How are you acknowledged as the successor?

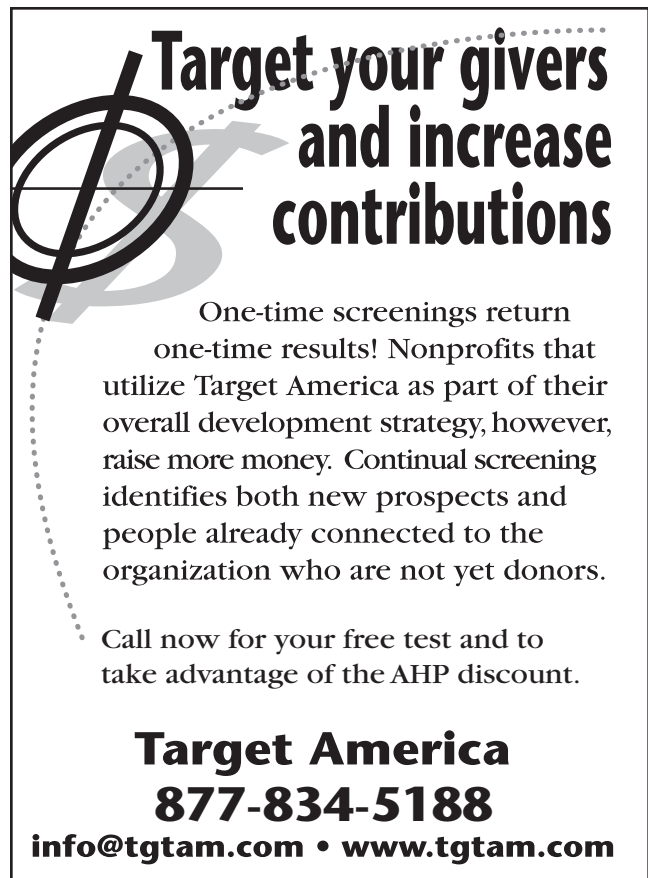
Most of us spend a fair amount of time networking with our peers, and we may be well known and respected by these colleagues. However, we are usually not known by hospital administrators or board members of other institutions. The chief development officer will be extremely helpful in this area by ensuring you have interaction with key administrators, including the hospital president as well as foundation board members. Seek every opportunity to build upon the relationships you make when shadowing the chief development officer.



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One of the greatest assertions in successor planning is that the successor will carry out the legacy of his or her predecessor. Be prepared to honor that legacy while establishing your own.

Who will make the ultimate decision?

If a member of the hospital administration, such as the chief executive officer (CEO), is responsible for the final decision on whether you will be chosen as successor, observe how the chief development officer interacts with that person. The chief development officer will work with you in providing opportunities for exposure to and interaction with the hospital CEO. Additionally, your interaction with the foundation board members will be key. Seek opportunities such as serving as staff liaison to board committees, or to joining the chief development officer on calls to individual board members.

How long does the CDO plan to stay?

This may or may not matter to you. The more time you have to observe the chief development officer at work, the more insight you will gain in terms of the total workplace environment. As you move through the cycle of assimilation and learning, you will also have a chance to fully grasp the nuances of the job in terms of policy, practice and politics.

What are your duties in the successor role?

A chief development officer who has taken the time and energy to handpick a successor undoubtedly has

expectations and priorities in mind for you—make sure that you understand them clearly. Ask for opportunities to represent the hospital in the community. Offer to take on special campaigns or programs where you will have a chance to showcase your abilities. Attend board meetings and offer to prepare presentations or programs. Accompany the chief development officer on donor stewardship calls to help ensure seamless transition with those who support your hospital.

How is integration with the current foundation staff achieved?

Meet and greet each staff person individually, taking time to learn their interests, achievements, responsibilities and aspirations. Set up regular meeting times with direct reports. Listen to them. Remember, they may have some

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anxiety about the ultimate change in leadership.

What can you do to acquaint yourself with fellow employees of the hospital?


Attend as many management and leadership team meetings as possible, allowing the chief development officer to introduce you. Ask the chief development officer for a list of those with whom you should meet personally. Who are the most respected employees? Who volunteers for employee functions? Go meet them. Most people are pleased that someone would take time out to seek their input or get to know them.

What is the CDO's plan to train you?

Be sure you meet regularly with the chief development officer to receive guidance he or she can give. Your CDO should set benchmarks to help

you better understand your own performance and measure it. Go to meetings with the foundation board chair and executive committee. The chief development officer also may ask for your help in putting together the annual plan for financial development and/or in strategic planning. Seek every opportunity for engagement.

Having the opportunity to work with the person you plan to succeed is a wonderful way to gain firsthand knowledge about the job, players and desired outcomes. It is a privilege to work with some of the finest people in the business of health care philanthropy, many of whom have paved the way for us in terms of establishing solid practices and principles. One of the greatest assertions in successor planning is that the successor will carry out the legacy of his or her predecessor. Be prepared to honor that legacy while establishing your own. Use the building blocks

given to you during this time to build your own programs, while honoring those of the person who chose you. 



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