

Successfully Navigate the Transition into a VP or Chief Development Officer Role

BY RICHARD TOLLEFSON

When a long-time major gift officer, annual fund manager, or advancement services director steps into their first chief development officer (CDO) or vice president (VP) role, the transition can be rocky, the learning curve enormous, and the expectations overwhelming. “The skills you mastered moving up the ranks are not always the ones that are relevant as you move into a first-time CDO or VP role,” says Gregory Leet, a consultant at Aspen Leadership Group. “It can be a profound shift.”

Yet, at other times, new leaders thrive as they take the reins and unleash ideas that have been bridled in their minds for years. This article explores that dichotomy and offers insights from those who strategically prepared and successfully navigated the challenges and obstacles they faced as first-time senior executives.

Adapt Your Skills

The skill sets of an ideal first-time CDO candidate are broad, varied, and often difficult to find in one person. These skills include a deep understanding of fundraising communications and advancement operations as well as the ability to effectively manage people, processes, and functions. The job requires playing a strong leadership role as part of the executive team and staff officer to the CEO and board, while simultaneously maintaining a portfolio of high-potential prospects and donors.

Externally, you’re the face and voice of the organization on behalf of the president and leadership team, and as such must be a strong spokesperson with the confidence and bravado to fill that role. At the same time, you need to be able to control your ego, so if your job is to “carry the briefcase of the CEO,” that isn’t an issue. While these skill sets can breed success in the CDO role, it’s unlikely one person will come with all these talents. Adapting your skills is the key to success when stepping into this position.

Plan Ahead, Build on Strengths, Overcome Limitations

Moving into a CDO or VP role means a rapid shift in the number of constituencies and stakeholders with whom you must authentically engage. There’s not a lot of time to “ramp up” your skills. At the same time, it’s important to show competence so those around you are confident that you’re the right person for the position.

For Kimberley Valentine, chief development officer for the Frank Lloyd Wright Foundation, experience gave her the confidence to know she was ready to take a leadership role, but she also quickly recognized her limitations

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and found ways to use them to excel in her job. “Experience is what brings us to these leadership positions,” says Valentine. “You can *want* to be a leader, but experience *allows* you to be a leader. Time management was a challenge for me. There are so many things thrown on your plate. You have to be skilled at delegation and allow others to step into leadership roles. You need to be that spoke in the

wheel that passes responsibilities on to others to allow them to grow in their positions.”

Even as knowledgeable and skilled as you may be in fundraising, the details of managing those finances can trip you up, as Jason Geiken, vice president for advancement at Arkansas Tech University, found when stepping into his role. His advice: get some basic finance knowledge before taking the leap. “It seems like there are hundreds of endowment management decisions every week that come across my desk,” says Geiken. “That was challenging for me. I would encourage others to spend time with the back-office team and attend a conference or webinar on endowment management, financial management, or advancement services to help you wrap your head around the type of financial decisions that will land on your desk.”

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Keep asking questions, advises Mike Remedi, chief development officer at the Desert Botanical Garden. “I’m constantly trying to understand why we do things the way we do them,” he says. It’s a wonderful opportunity to investigate the need to change the status quo or to continue on the same path. An inquisitive nature and strong listening skills helped Remedi build confidence and gain the support of his colleagues.



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Exercise Emotional Intelligence

The common business phrase of “managing up” is a solid guidepost to follow. So is the concept of “emotional intelligence,” which in this case means moving from working with donors or development teams to working with stakeholders with real power and influence over plans and goals.

“It can feel like being hit by a tsunami,” says Leet. “Each constituency or stakeholder feels they are your top priority when you must find a way to balance them all.” So how do successful leaders do it?

Find your center. For Remedi, that center is a five-year strategic planning document that serves as the organization’s guiding manifesto. “Everything centers back to that document,” says Remedi. “It helps everyone stay focused on what we’re trying to do. Even with a large board like ours, the board and senior leadership keep each other in check on organizational engagement and performance. It all gets rolled up into that strategic plan, which helps avoid distractions or reactionary decision-making.”

In the case of a university campus, where competing constituencies can be overwhelming for a first-time CDO, your center must be the university president, says Geiken. “Make sure your agenda is the president’s agenda,” he advises. “Make sure the president knows you are his or her biggest cheerleader.”

Staying true to yourself is an important part of the process, according to Valentine. “So much of this is about being yourself, even from the first interviews for the position,” she relates. “The more you show you are sincere and passionate, and even stating that you are going to be the cheerleader, the greater your chance for success.”

Build A Support Team

Another tool to help transition to a leadership role is to build a strong support network. “That network may include someone with expertise in areas you may not have or colleagues in a similar role who may be

experiencing some of the same challenges you are and who you can bounce ideas off of,” says Geiken.

“We all step into these roles with different experiences, and I never try to insinuate that I know everything,” says Remedi. His network includes colleagues he’s known over the years that help “keep me centered,” he says. It allows him to ask questions in his quest to continue learning and growing in his role.



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Known as a “people-keeper,” Valentine works hard to maintain connections with former colleagues, those she’s mentored, and those who have mentored her. “That’s been really good for me at every level, whether I’m the one being called upon for help, or whether I’m calling them for help or guidance.”

Be Confident, Demonstrate Competence

From navigating conflicts to understanding analytics to building consensus, the skills needed for a CDO or VP role are varied and extensive. The role may require non-traditional training and skill sets. For those up for the challenge, it can be rewarding and fulfilling. However, becoming a CDO is not the only path to success. Seek the job if you want it, but it’s important to be open to other roles that may better fit your skills and personality.



Key Takeaways for First-Time CDOs

1 STRATEGICALLY PREPARE FOR THE TRANSITION

Having a basic knowledge of finance, accounting, and analytics can go a long way in helping to prepare for this leadership role, as well as many other skills learned from previous experience. It's important to have the desire to take on management responsibilities and know how to negotiate and find consensus.

2 SELF-ASSESS STRENGTHS AND WEAKNESSES

Play to your strengths to demonstrate competence and confidence in this new position. At the same time, listen respectfully to those around you to build relationships and work to meet them where they are. If this self-assessment leads you to the determination that you are not ready for a leadership role, take a step back and find a mentor to help you strengthen those weaknesses. A leadership role is not for everyone, and that's OK too.

3 DON'T BE AFRAID TO SHARE

When the tsunami hits (and it will), don't be afraid to ask for help. More than likely, those around you will appreciate the opportunity to help accelerate your learning curve or step up and take on new responsibilities under your guidance. Seeking help is not a sign of incompetence, and knowing your limitations can demonstrate that you are at ease with your colleagues and confident in your team.

4 SET PERFORMANCE EXPECTATIONS EARLY

The relationships between the CDO, the CEO, and the board of directors are critical to management and fundraising success. These relationships fail most often because of misaligned expectations, unclear metrics, and a lack of communication. Knowing how to measure success is an important first step when starting a new position, and it's even more critical in a CDO or VP role where you have multiple bosses with varying ideas of success. Managing expectations and exercising emotional intelligence are key to finding work-life balance.

5 STAY TRUE TO YOURSELF

Right from the first interview, be yourself. Show your true passion for the job, commitment to supporting the mission of the organization, and dedication to advancing the priorities of the CEO or president. Make sure you have the right people around you to help you learn, build good relationships, and provide support when you need it.



Richard Tollefson is founder and president of The Phoenix Philanthropy Group, an Arizona-based international consulting firm serving nonprofit organizations as well as institutional and individual philanthropists.