



# Transitioning to Leadership: Insights from the CPO/CDO Survey



# Today's speakers



**Mark McCampbell**  
Senior Vice President  
Advancement Resources



**Alice Ayres**  
President and Chief Executive Officer  
AHP

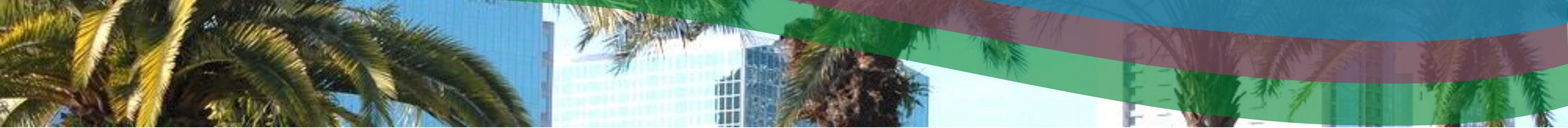


**Harvey Green, FAHP, CFRE**  
Senior Vice President and Chief  
Development Officer  
WellSpan Health



# About the Study

- Over 80 CPOs/CDOs
- Respondents had at least 10 years of experience
- Wide representation across healthcare systems in North America
- “You matter”



# The Current Landscape

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New CPOs/CDOs are not supported to the level they could be.

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77% received NO formal training or orientation specific to their role.

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*“There was zero management training.”*

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*“My career has been trial by fire, learn as you go and very painful.”*



# Top 5 Challenges

01

Balancing competing priorities and managing time effectively.

02

Handling financial aspects and budgeting for the foundation.

03

Building and leading an effective foundation team.

04

Navigating complex legal and regulatory frameworks.

05

Developing and executing fundraising strategies.



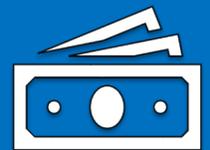
# Significant Surprises, Unexpected Challenges

- *“Foundation was not a well-oiled machine”*
- *“Hospital does not support fundraising”*
- *“Lack of a long-range vision”*
- *“Non-fundraising activities”*
- *“Healthcare policies/procedures”*
- *“Lack of understanding of fundraising by leadership”*
- *“Managing the board and its subcommittees”*

# Measuring Performance



Often, metrics are only finance-based and do not track the relationship building that is key to advancement.



Often, annual fundraising and campaign goals are arbitrary.

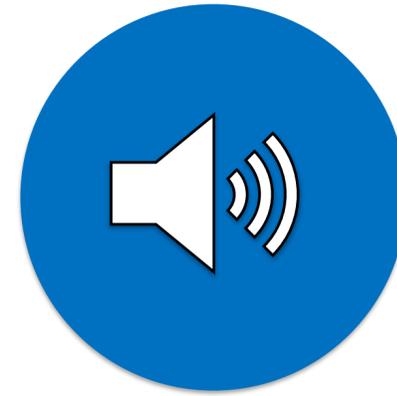


Measurements set by advancement are not relevant to executive leadership.

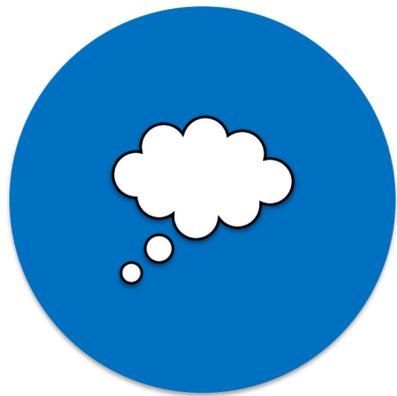
# Management and the Culture for Philanthropy



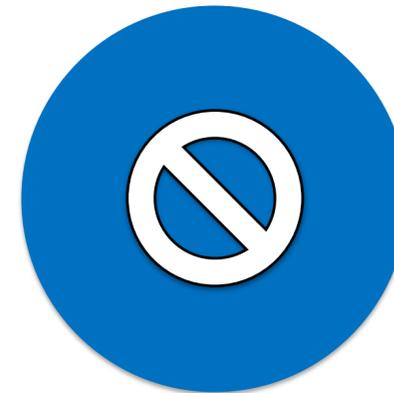
Low morale and poor cooperation



All talk, no action



C-suite has competing priorities



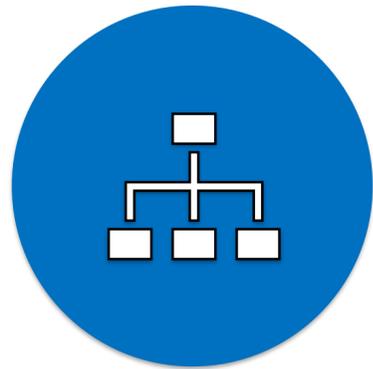
Lack of implementation leads to new leaders being frustrated



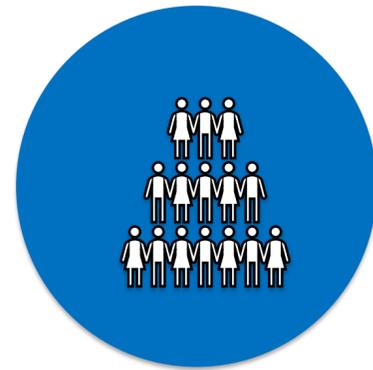
# Advice for New CPOs/CDOs

- Internal relationships are important
- Build your inner cabinet
- Mentor and empower your team
- Consider what you need to focus on in the first 90 days
- Choose professional mentors outside your organization

# Support Systems



PROFESSIONAL  
NETWORKS OR  
ASSOCIATIONS: 79%



ACCESS TO EXPERIENCED  
FOUNDATION LEADERS:  
54%



EXTERNAL  
TRAINING  
PROGRAMS: 42%



MENTORSHIP  
PROGRAM: 13%



# The Top 5 Priorities for Successful CPOs/CDOs

1. Relationship Building
2. Mentorship and Networking
3. Understanding Hard Skills
4. Improving Soft Skills
5. Strategy and Vision



# 1. Relationship Building

- Engagement is key to build and nurture those internal relationships within the organization



## 2. Mentorship and Networking

- Continue to seek guidance, build a professional network, and be an active part of associations

GROWTH

EFFICIENCY

IMPROVEMENT

PERFORMANCE

### 3. Understanding Hard Skills

- Take time to focus on and learn budgeting/finances, legal, and regulatory frameworks



## 4. Improving Soft Skills

- Build a healthy culture for your team by:
  - Training
  - Team building
  - People-centered values



## 5. Strategy and Vision

- Set sights on the big picture and develop fundraising strategies that align with and meet your organization's goals



# Pathways to the Future

- Continual investment into leaders' growth improves overall retention.
- New leaders that are valued and supported will be successful in their career and with the organization.
- New leaders provided with appropriate resources will be successful.
- Today's new CPOs/CDOs are tomorrow's system leaders—investing in those new leaders vastly increases your organization's long-term chance of success.

Scan the QR code or visit  
the link to Download  
The Healthcare CPO/CDO  
Leadership Report

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# THANK YOU!

Connect with us.

Mark McCampbell



Alice Ayres



Harvey Green

