

Becoming Business Drivers: A Blended Approach to Communications and Donor Engagement to Support Fundraising

Carolyn Vivaldi, MS

Assistant Vice President

Strategic Communications and Donor Engagement

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Northwell Health[®]
Foundation

About you!



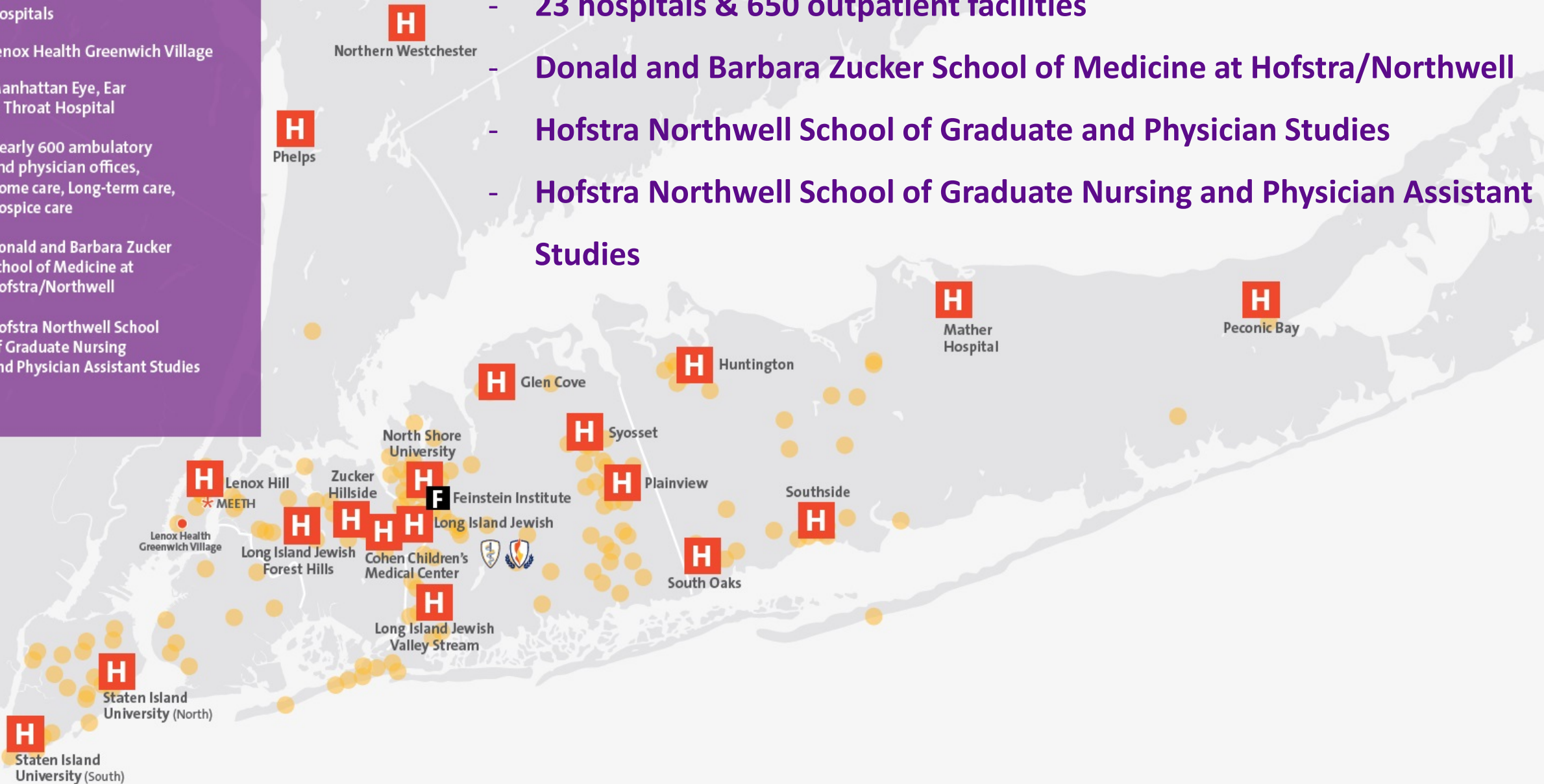
About Northwell





- H** Hospitals
- Lenox Health Greenwich Village
- Manhattan Eye, Ear & Throat Hospital
- Nearly 600 ambulatory and physician offices, Home care, Long-term care, Hospice care
- Donald and Barbara Zucker School of Medicine at Hofstra/Northwell
- Hofstra Northwell School of Graduate Nursing and Physician Assistant Studies

- NY State's largest private employer
- 66,000 employees
- 23 hospitals & 650 outpatient facilities
- Donald and Barbara Zucker School of Medicine at Hofstra/Northwell
- Hofstra Northwell School of Graduate and Physician Studies
- Hofstra Northwell School of Graduate Nursing and Physician Assistant Studies



Northwell Health Foundation Fundraising Focus

Organization-wide Initiatives

– Research

- Bioelectronic Medicine
- Clinical Research
- Outcomes
- Cancer

– Veteran’s Programs

– Women’s Health

Cohen Children’s Medical Center

– Facilities, Program, Endowment

Hospitals (by Region)

– Central Region

- North Shore University Hospital
- LIJ Medical Center

– Eastern Region

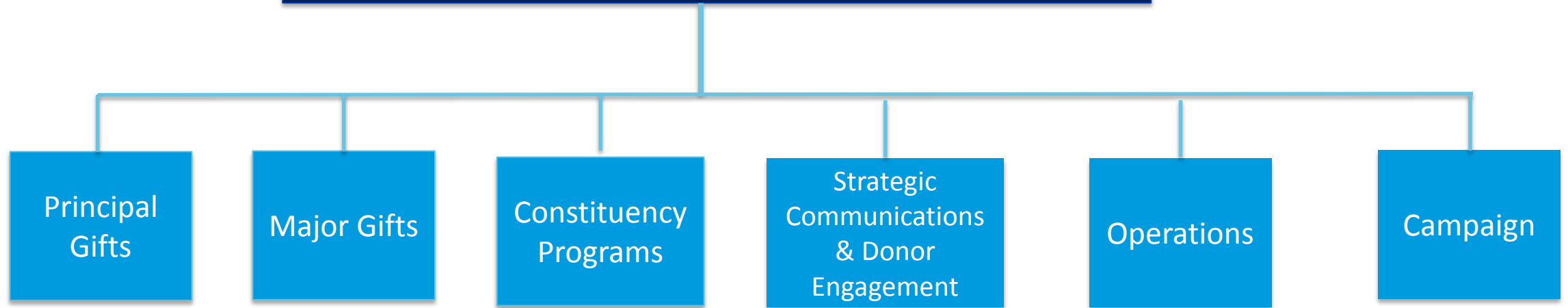
- Southside Hospital
- Huntington Hospital
- Peconic Bay Medical Center
- Glen Cove Hospital

– Western Region

- Lenox Hill Hospital
- Lenox Health Greenwich Village
- Manhattan Eye, Ear & Throat Hospital
- Northern Westchester Hospital
- Phelps Hospital

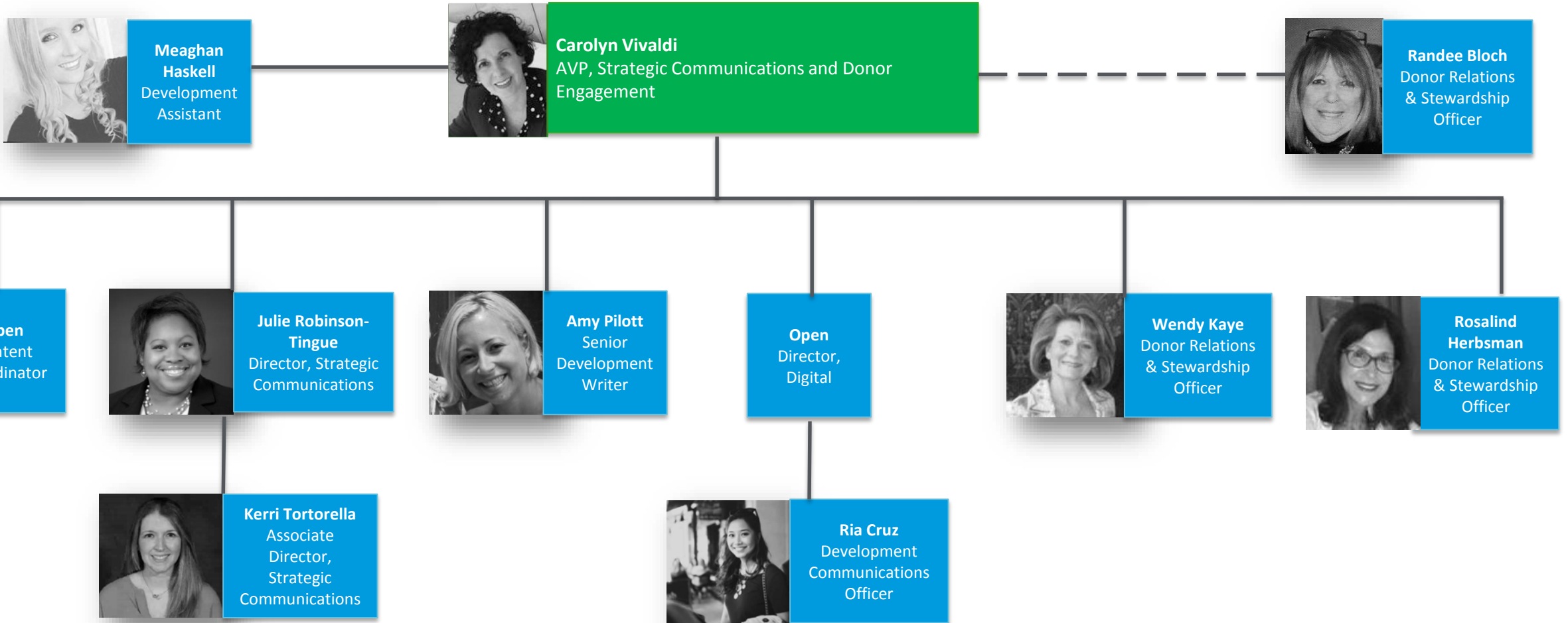
– Staten Island University Hospital

Northwell Health Foundation

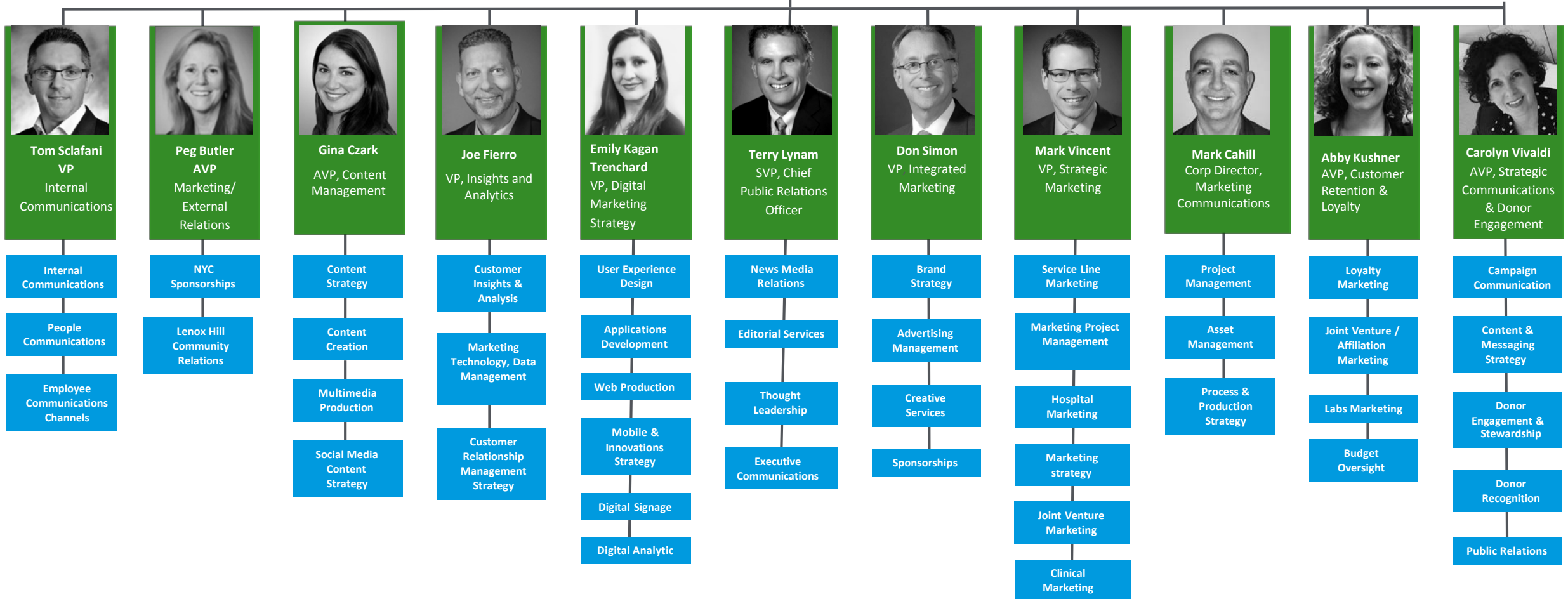


Our mission is to inspire the most people in our communities to advance Northwell Health by giving to the best of their ability.

The Team: Strategic Communications & Donor Engagement



Corporate Marketing & Communications






Becoming Business Drivers



Becoming Business Drivers: Leading During a Significant Moment in Time

- **Reorganized Stewardship function under Strategic Communications**
 - Need for more strategic stewardship planning execution
 - Need for complete integration of StratComm and Stewardship functions
- **Preparing for the public launch of Northwell Health's campaign**
 - StratComm leading communications strategy and execution in a complex health system
 - Need for heightened focus on principal donor stewardship
 - Need to identify and manage Sustainable Stewardship opportunities
 - New website: support.northwell.edu + New content strategy
- **Increased integration with Corporate Marketing Communications**
- **Need to strengthen, empower and grow the team professionally**
 - Need to work more efficiently and collaboratively as a team

Becoming Business Drivers: The Model

SERVICE PROVIDERS (REACTIVE) 	BUSINESS PARTNERS (PROACTIVE) 	BUSINESS DRIVERS (INTERACTIVE) 
<ul style="list-style-type: none"> ▶ Transactional and tactical execution (fulfills requests) ▶ Others (external to team) 'take on' functional responsibilities 	<ul style="list-style-type: none"> ▶ Strategic partner (supports decisions – has a permanent “seat at the table” to anticipate Foundation communications and stewardship needs) 	<ul style="list-style-type: none"> ▶ Strategic influence (identifies issues/opportunities to influence decisions and drive results)
<ul style="list-style-type: none"> ▶ Task orientation ▶ Volume output 	<ul style="list-style-type: none"> ▶ Functional orientation ▶ Measures outputs and outcomes 	<ul style="list-style-type: none"> ▶ Fully integrated orientation helping to drive fundraising success
<ul style="list-style-type: none"> ▶ Functional expertise ▶ Developing management skills 	<ul style="list-style-type: none"> ▶ Functional expertise and business knowledge ▶ Transactional leadership 	<ul style="list-style-type: none"> ▶ Applies business acumen to functional expertise ▶ Advanced development expertise ▶ Transformational leadership
<ul style="list-style-type: none"> ▶ Treated as a fulfillment team 	<ul style="list-style-type: none"> ▶ Perceived as a strategic team 	<ul style="list-style-type: none"> ▶ Valued as thought leaders

Using Appreciative Inquiry to Define Success

“If we were meant to talk more and listen less,
we would have two mouths and one ear.”

– Mark Twain

Appreciative Inquiry

- Appreciative Inquiry (AI) is a change management approach that **focuses on identifying what is working well, analyzing why it is working well and then doing more of it.**
- The basic tenet of AI is that an organization will grow in whichever direction that people in the organization **focus their attention.**
- If all the attention is focused on problems, then identifying problems and dealing with them is what the organization will do best. If all the attention is focused on strengths, however, then **identifying strengths and building on those strengths** is what the organization will do best.

Appreciative Leadership

Think about...

What does this
mean to you and
how you work?

What does this
mean to us and for
the way we work?

*“Appreciative Leadership is the relational capacity to **mobilize creative potential** and turn it into positive power – to set in motion positive ripples of **confidence, energy, enthusiasm, and performance** – to make a positive difference in the world.*

Relational | Positive | Turns Potential into Power | Rippling Effect

It’s a clear movement away from the habitual, traditional, and individualistic command and control practices of leadership toward a ‘new normal.’”

*Excerpt from *Appreciative Leadership: Focus on what works to drive a winning performance and build a thriving organization.**

Shifting our Focus and Changing Behavior: Retreat Strategy



Retreat Strategy

9:00am – 9:45am

Welcome & ice breaker (2 minutes for each person)

9:45am – 10:45am

Session 1 | Reflections on evolving StratComm/DE (chart)

10:45am – 11:00am

Break

11:00am – 12:00pm

Session 2 | Imagining our future as business drivers

12:00pm – 2:00pm

Cooking activity and lunch

2:00pm – 3:30pm

Session 3 | Driving donor engagement

3:30 – 3:55pm

Debrief

4:00pm

Adjourn

December 4, 2017

Cooked to Perfection

49 Main Street, East Rockaway, NY 11518



Retreat Preparation

HARVARD MANAGEMENT COMMUNICATION LETTER

A NEWSLETTER FROM HARVARD BUSINESS SCHOOL PUBLISHING TOOLS, TECHNIQUES, AND TIPS

COMMUNICATION SKILLS BY TOM KRATTENMAKER

Change through Appreciative Inquiry

A new way to get your employees to change without (much) pain

“I really enjoyed the reading about appreciative inquiry. Not only do I feel it applies to the work environment, but in my personal life as well. I want to focus on positivity both in and out of the workplace.”

Change through Appreciative Inquiry

by Tom Krattenmaker

asked, just the latest ham-handed nonsense imposed by their out-of-touch bosses?

Meanwhile, at Enlightened Lighting, Inc., management and staff approached the change process a different way. Employees came together to talk not about problems and solutions, but their greatest successes. What was it like, they were asked, when this organization was at its best? Staff members told stories and reviewed them together to glean common themes. The company

University and is being used by a growing number of corporations and nonprofit organizations around the world.

“The more you focus on *problems*, the more you slow yourself down,” says Jane Magruder Watkins, a leading AI practitioner and coauthor (with Bernard J. Mohr) of the book *Appreciative Inquiry: Change at the Speed of Imagination*. “The more you seek out what works and create images of where you want to go, the better able you’ll be to keep up with the ever-increasing rate of change. The old model is about fixing up the status quo. That’s not good enough anymore. By the time you solve one set of problems, 900 more things are wrong.”

Kenneth Gergen, a Swarthmore College psychology professor credited with developing social constructionism, says that the way people talk about their organizations shapes their behavior within them. “It’s not clear how much is to be gained from a problem orientation,” says Gergen. “You can find problems everywhere when you start looking. If you take it too far, you

held 10 workshops to explore what the company did best and why.

As reported by employee communication manager Ruth Findlay in the February 2001 issue of the *AI Newsletter*, each of the workshops was composed of a mix of people from most departments and all salary grades. Working in pairs, participants interviewed one another about particular instances in the previous six months when they felt energized by the contribution they were making to the bank. They then explored the ingredients of the high moments. The stories were collected and analyzed for common standards of communication and positive actions that could be taken to bring about change.

Out of the stories came a report called “100 Voices,” which mapped out how the division would achieve a quality of internal communications that matched the excellence it had already achieved in corporate finance.

“The information that’s needed in an organization is alive at every level,” says Watkins. “It’s no longer the case that people at the top know what’s best. Most good leaders realize that they really need to access all the intelligence of their organization. AI gives you the ability to do that. It’s extremely democratic.”

Retreat Preparation

Use this worksheet to answer the questions below. Take time to reflect upon the questions and answer thoughtfully. Be prepared to share these reflections at the retreat – and bring this document with you.

ICEBREAKER

- Reflect on a time at Northwell where you experienced a strong sense of achievement/pride. What was the project or experience? Why are you proud of this?
- Who helped contribute to this success?
- How did it make you feel?

Retreat Reflections

SESSION 1 – Reflect upon the Business Driver chart

- From your perspective of how you function/perform as a member of the team, **where do you see yourself** in this grid? When are you performing as (give one specific example of any that apply to you):

Service Provider | Business Partner | Business Driver

- From your perspective of **how the team functions/performs**, when are we – as a team – performing as (give one example of each):



Service Provider | Business Partner | Business Driver

SESSION 2 – Imagining our future as business drivers

- What **behaviors** and **skills** we need to employ – both individually and as a team – to get us to this role? A behavior is how one acts or conducts oneself, especially toward others. A skill is an ability to do something.

Retreat Reflections

“The chart serves as an important tool. It clearly identifies where we are currently and where we want to be as drivers, and how we must access the expertise and intelligence of each team member to achieve our goal.”

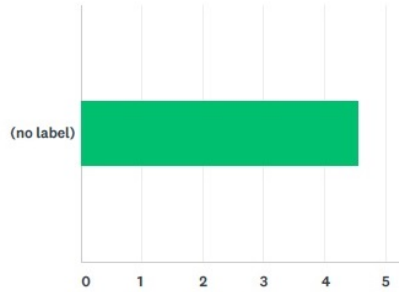
BUSINESS PARTNERS (PROACTIVE) 	BUSINESS DRIVERS (INTERACTIVE) 
<p>Strategic partner (supports decisions – has a permanent “seat at the table” to anticipate Foundation communications and stewardship needs)</p>	<p>▶ Strategic influence (identifies issues/opportunities to influence decisions and drive results)</p>
<ul style="list-style-type: none"> ▶ Task orientation ▶ Volume output 	<ul style="list-style-type: none"> ▶ Functional ▶ Measures
<ul style="list-style-type: none"> ▶ Functional expertise ▶ Developing management skills 	<ul style="list-style-type: none"> ▶ Functional knowledge ▶ Transactional
<ul style="list-style-type: none"> ▶ Treated as a fulfillment team 	<ul style="list-style-type: none"> ▶ Perceived

“The chart clarifies the evolution of behaviors that we may not be aware of actually needing change. While being mindful of our ever present need to be service providers, we must clearly communicate with our team, sharing critical information to educate and provide leadership strategies to move gifts and projects forward.”

Retreat Feedback

Q2 The ice breaker was an effective way to identify emotions and behaviors that contribute to how I'm performing when I'm my best self at work.

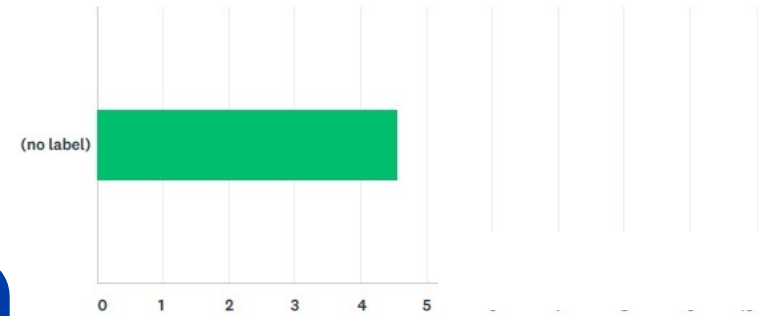
Answered: 9 Skipped: 0



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL
(no label)	0.00%	0.00%	0.00%	44.44%	55.56%	9
	0	0	0	4	5	

Q7 I understand what behaviors I will need to employ to help the team become business drivers.

Answered: 9 Skipped: 0

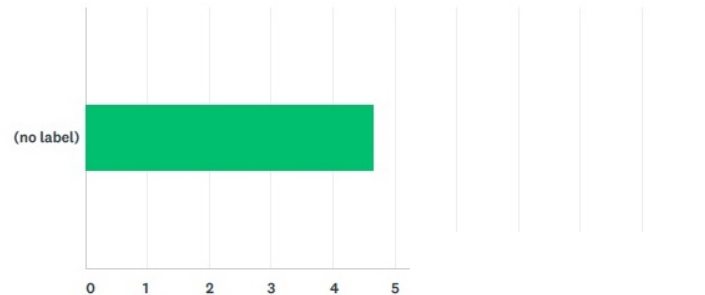


	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	0.00%	0.00%	0.00%	44.44%	55.56%	9	4.56
	0	0	0	4	5		

The team rated the effectiveness of the retreat 4.2 out of 5

Q4 The reflection on the Evolving Strategic Communications & Donor Engagement team chart helped me to understand my current and future role as a business driver.

Answered: 9 Skipped: 0



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	0.00%	0.00%	0.00%	33.33%	66.67%	9	4.67
	0	0	0	3	6		

Behaviors of High-Performing Individuals and Teams

The transformation from service providers to business drivers

1. Be

Exer

“I commit myself to leading by example, acting as a catalyst for process improvement, and focusing on the shared goal to become more of a business driver. This will not only help me to grow, but also contribute to the team’s elevation and collective success.”

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“I will, and I’ll encourage our team to, strategically assess projects and not agree to all. I’ll bring them back to the team for discussion to make sure we are ‘working smarter, not harder’ and that it aligns with our strategic goals and the campaign. I’ll look to implement huddles where it makes sense to discuss projects or other items.”

4. Prioritize, manage expectations and keep promises

Great teams do an exceptional job of

5. Keep an open mind and allow team

If innovation is important, it is critical there is a way to improve. However, to innovate, be open to considering and

“I will over-communicate, be as transparent as possible, and find ways to cross-connect the work to support my colleagues, share the responsibility, and become more integrated as a team.”

ses they make to one another as well as to other

being able to challenge processes if they feel that e married with challenging them. In order to rove them for the greater good.

Strategic Communications and Donor Engagement

“Super Seven” meeting ground rules

- 1. Prepare for meetings beforehand.** State meeting objective/goal in the body of meeting invitation so everyone’s on the same page. Each agenda item should have 5-10 minutes allocated to it. Distribute agenda 24 hours prior to a meeting. Each agenda item should have a time limit being discussed. Include time limit with each agenda item.
- 2. Meetings should be 45 minutes.** Manage time to ensure promptness. Keep meetings to 45 minutes.
- 3. Please be present.** Do not make urgent calls/texts outside of room if an immediate response is needed.
- 4. Give everyone the chance to speak and contribute to the conversation.** Speak to move the dialogue forward – not to gripe and complain.
- 5. Be open-minded and ask clarifying questions.** Challenge the ideas, not the people suggesting them.
- 6. Before leaving, summarize decisions, action items, next steps and responsibilities of attendees.**
- 7. Send a meeting summary** within 24 hours following the meeting with tasks, due dates, etc.

“Stressing the importance of ground rules will encourage all of us to be better prepared, work more efficiently and have greater respect for our colleagues’ time, resulting in enhanced productivity. By utilizing the established ground rules, we are driving others towards fundraising success.”

Practicing & Sustaining Business Driver Success

Outcomes & Impact




Operationalize Business Driver Performance Through Evaluation Process

A minimum of three goals for 2018 + one to two stretch goals

- **Goals** – Goals are above **and beyond your day-to-day area of responsibility** and should focus on strategic initiatives you will own and drive (“Improving,” “Developing,” “Initiating,” etc.). Goals should be measurable by **distinct metrics**.
- **Stretch Goals** – Stretch goals are items that would require you **to go above and beyond achieving your stated goals** and are characterized by initiatives that are more complex and more difficult. They should be aspirational and transformational. It’s not always possible to achieve stretch goals but doing so represents stellar performance – the characteristic of high performance.
- **Business Driver Goals** – Among your three goals, you identified one as a result of our retreat that represents you performing as a business driver. Select one of those goals to share with your supervisor. Together you will develop metrics around how you will measure your success. **All goals should have metrics associated with them so that you can demonstrate your success toward that goal.**
- **Collaborate** – Have conversations with your supervisor to identify, clarify and refine your goals, stretch goals and the business driver goal. This should be a collaborative process.

Change to Deliver Measurable Outcomes

- **Behavior** – Team members internalized business driver behavior and thinking
 - What should I focus on? What shouldn't I focus on? How can we make this better?
 - **Metrics** – Business Driver goals written; metrics created; team committed themselves to their (weighted) goals in Taleo
 - **Perception** – Act and be perceived as business drivers in stewardship and strategic communications
- 
- Stewardship actions and reminders incorporated into RE
 - Principal gift donor list evaluated for stewardship assignments and opportunities; to be incorporated into RE
 - Quarterly stewardship meetings now to be held bi-monthly; agendas planned with VPs; we drive!
 - We're exploring sustainable stewardship opportunities and ensuring execution

Change to Deliver Measurable Outcomes

Operationalizing Strategic Communications and Donor Engagement Best Practices

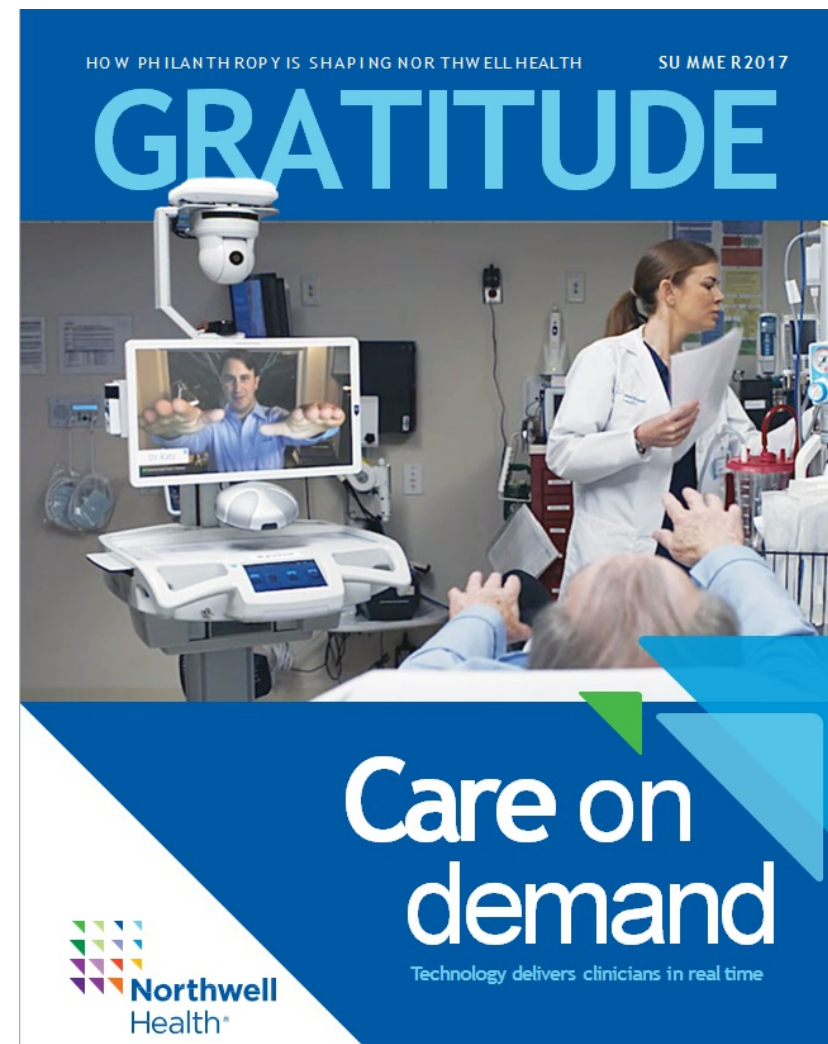
- Gift Communications Plan
- Gift Publicity Policy
- Memorials & Obituary Policy
- Donor recognition process & training
- Major gift proposal templates
- Stewardship templates
- Sustainable stewardship plan for Advancing Women in Science and Medicine (AWSM)
- [Stewardship video for Susan and Leonard Feinstein](#)

Relational | Positive | Turns Potential into Power | Rippling Effect

More Outcomes...with More to Come!

Operationalizing Strategic Communications and Donor Engagement

- Workflow & Efficiency Guidelines
- Guidelines for Event Photography
- Storytelling Workshop
- Proofreading Workshop
- Northwell Health Style Guide Workshop
- Writing for the Web Workshop
- Launch of a Foundation-wide comprehensive content strategy



Relational | Positive | Turns Potential into Power | Rippling Effect

Susan & Leonard Feinstein

- Stewardship credited with articulating the impact of the Feinstein's initial gift, leading to a new \$25M in 2016
- Significant media coverage with internal benefits
- Communications plan that inspired a shy principal gift donor



Relational | Positive | Turns Potential into Power | Rippling Effect



Sandra Atlas Bass

- Stewardship credited with advancing gift conversations leading to \$40M gift
- Agreed to allow us to publicize her gift amount and total giving – for the first time in 25+ years
- Agreed to press interviews
- Publicity impact with internal benefits

Relational | Positive | Turns Potential into Power | Rippling Effect

Let's chat.

cvivaldi@northwell.edu

Thank You!