

LESSONS FROM LOSS: ADVANCING THROUGH TRAGEDY

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Who we are...

- Part of a 5 school UMass system
- Urban, public research university
- 50 years old
- No football, no dorms, several legacy institutions
- “Young” development operation
- Total staff of 25
- Average time at UMass Boston ~10 years
- 3 years and \$68m into \$100m campaign
- Alumni participation rate of <5%

What happened...



UMass official killed in crash 'was always there for you'

The Boston Globe - Jun 2, 2016

Gina Cappello was a vice chancellor at the University of ... Cappello died Tuesday from injuries sustained in a multicar crash in Oxford.



Now what...

- Who do we tell and how?
- Who is in charge?
- Who makes decisions?
- What is our responsibility?
 - As friends
 - As staff
- What's appropriate?
- Who can I influence to get things done?
- What can I do? Does anyone know what I do? How much do I need to take on?
- Can we set up a way for our donors to “help”?

Telling our constituents

Who do we need to tell?

- Boards
- Prospects/Friends
- Prospects
- Chancellor's prospects
- "Frequent flyers"
- Alumni population generally

How?

- Call from UA staff
- Call from Chancellor
- Personal Email
- Personal note
- Blast email
- Alumni magazine
- News media

WHO DECIDES???

.... Who is keeping track?

Getting un-stuck

- What does the family need?
 - What are they asking for?
 - What aren't they asking, but we know we can help with?
- WWGD– What Would Gina Do?
 - If it were reversed, who would she call and tell personally?
 - What was her legacy?
 - What causes did she care most about on campus?
- What connections, experience, or knowledge do I have?
 - The donors we both worked closely with/letters I write for her
 - How to set up a scholarship fund
 - Available Naming opportunities
 - Communicating with grieving families

The Good

- We were clear in our org chart, roles, and goals as a division
- Established the Gina M. Cappello Memorial Scholarship Fund
- Challenged the Board of Visitors to make this their giving priority
- Decision was made to present news to all alumni in Alumni Magazine



The Bad

- Some of our donor “friends” were inconsiderate
- The Chancellor and administrators were also grieving
- Attempts to be helpful were being perceived as “opportunistic”
- Decisions were being made— or not— without input from anyone in UA and not always shared with staff
- The protective shield was removed
- The communication wires to administration had been cut
- We were in a vacuum: no leadership, lots of questions, blinding grief... and summer

The Ugly... from a DR standpoint

- Some donors felt blindsided...
- We missed an opportunity to do things better
- Staff who maybe *should have* stepped up, chose not to
- We did not reassure concerned donors, transition prospects, or have any answers to any questions about leadership
- We lost staff, and again, lacked prospect transition

My advice...

- Take care of yourself
- Take care of your career
- Take care of business now

1. Take care of yourself

- Grieve, take time off
- Find your “sanctuary”
- Let your values inform your actions
- Speak up when personal boundaries are crossed

2. Take care of your career

Put your ducks in a row

- Do you have an annual plan or strategic plan? Could you speak to it at a moments notice?
- Do you have an “elevator pitch” for what you do?
- What do you do that only your boss sees?
- What do you need to sustain your program? To grow?

2. Take care of your career (con't)

Freshen up your resume

- Have you updated it recently with data?
- Could you speak to recent STAR examples?
- Be prepared for new opportunities internal and external
- Maintain professional contacts

2. Take care of your career (con't)

Identify new mentors

- Inside your organization
- At aspirational peer organizations

Use your network

- ADRP List-serv
- Professional developments and trainings
- Realize your donors may be your network

3. Take Care of Business Now

Create a Leadership Death Protocol

- Coordinating Office for University Response
- Verification of Death
- Administrative Notification to University Community—including Alumni and Donors
- Condolence to Family
- Memorials
 - Establish a Fund with family's permission
 - Steward family and donors with special care

3. Take Care of Business Now (con't)

Create a Succession Plan

- Identify the #2 to each leader within your division
- Get buy-in from top leadership at your organization

Reinforce the importance of your database

Strengthen prospect transition process as donor relations matter

- Have more than one institutional relationships with your top tier donors

And if the day ever comes...

- Trust your gut
- Persist in doing the right thing for your donors
- Have compassion
- Circle the wagons and share information
- Believe that everyone is doing their best in a horrible situation

...**BUT**... if you can't do those things

- Accept certain limits
- Do what you can, where you can
- Be prepared to move forward