EXECUTIVE THOUGHT PARTNER

“I Don’t Know How to Ask Anyone for Anything”

Case Study 05 • Small Nonprofit • CEO Succession & Revenue Identity

Representative case. Details generalized to protect confidentiality.

TWO LEADERS. ONE ROOM. ONE CONVERSATION.

This case study is unusual. Most ETP conversations involve one leader working through one challenge. This one had two leaders in the room — at different stages of their tenure, carrying different fears, facing the same organizational cliff — and the real work required reading both of them simultaneously.

THE CEO

One to two years from departure. Mission-driven, clear-eyed about the organization’s financial fragility, and honest enough to know the next few years without a serious rethink of revenue weren’t guaranteed.

THE COO

Likely successor. Operationally strong. And quietly carrying a fear she hadn’t named yet — that the job she was about to inherit would require her to become someone she had no idea how to be.

WHAT THE CEO SAID THE PROBLEM WAS

> *“We need to rethink what it means to be a center of education in this community. I don’t think we get through the next few years without a big change in fundraising and how we grow our membership.”*
>
> **— The CEO, entering the conversation**

WHAT HAPPENED IN THE ROOM

The COO joined the conversation and something was off. Not hostile — but guarded. Careful. The kind of energy that reads as resistance until you sit with it long enough to understand it’s something else entirely.

> **THIRTY MINUTES IN**
>
> *She admitted — quietly, and with visible discomfort — that she had no experience in revenue generation. Had never built a donor relationship. Didn’t know how to fundraise. And more than any of that: wasn’t comfortable asking anyone for anything.*

What looked like standoffishness was actually exposure. She was about to step into a CEO role at an organization in financial stress, and she believed — genuinely believed — that the job would require her to become something she had no idea how to be.

WHAT THE PROBLEM ACTUALLY WAS

The COO didn't have a fundraising problem. She had an identity problem rooted in a fundamental misunderstanding of the role.

She had collapsed the CEO's job into the mechanics of asking — and measured herself against a skill set she didn't have, in a role she hadn't yet stepped into, for an organization that needed a different kind of leader than the one she was afraid of becoming.

- The ask is a technique. The access, the trust, the story — that's leadership.
- A CEO doesn't need to be the most skilled fundraiser in the building.
- They need to be the most credible carrier of the mission in the room.
- She wasn't being asked to become a major gifts officer. She was being asked to lead.

The real issue wasn't that she couldn't fundraise. It was that she didn't yet understand that her job wasn't to be the benefactor — it was to be the conduit. To carry the mission into the room. To open the relationship. To create the conditions in which generosity becomes possible.

She had been measuring herself against the wrong thing entirely.

THE WORK

The conversation shifted the moment the real barrier was named. Not managed — named. There's a difference.

We stopped talking about fundraising strategy and started talking about what a CEO actually does in a revenue relationship. We worked through what that looked like specifically for her context: an education-centered nonprofit, community-embedded, with relationships that already existed but had never been activated philanthropically.

> **THE REFRAME THAT UNLOCKED THE ROOM**
> *The infrastructure of trust was already there. What was missing wasn't skill — it was the framing. Internally, for how she understood her own role. And externally, for how the organization could position its needs as an invitation for others to participate in something meaningful.*

We also named what the outgoing CEO carried that the COO would need to intentionally build before the handoff: not a donor list, but a relational posture. The willingness to be in the room not as an operator, but as a leader who believed deeply enough in the mission to invite others into it.

THE SHIFT

The COO's posture changed visibly — not because she suddenly knew how to fundraise, but because the job stopped being about what she couldn't do and started being about what she already was.

The inadequacy she had walked into the room carrying wasn't hers to own. It belonged to a false definition of the role.

WHAT SHIFTED FOR THE CEO

Clarity on what the succession transition needed to prioritize — not a fundraising training program, but a leadership identity conversation with her COO before the handoff.

WHAT SHIFTED FOR THE COO

The reframe that unlocked her from paralysis she hadn't fully named until that morning. The job was asking her to be more of who she already was — not less of what she wasn't.

THE OUTCOME

The organization's revenue rethink was still ahead of them. But the person who would lead it was no longer stuck on the wrong question — and the person passing the baton knew what to prioritize in the time she had left.

> *"I've been dreading this role because I thought I had to become someone I'm not. I didn't realize the job was asking me to be more of who I already am."*
>
> **— COO, Small Nonprofit — CEO-elect**

WHAT ETP DID

Read the room. Waited. Named the thing that thirty minutes of careful distance had been protecting. Then created the space for two leaders — at different stages, carrying different fears — to think clearly about what the organization needed and what they were each actually capable of.

No assessment tool. No framework handout. No action items.

Just the right moment, and the right question.

EXECUTIVE THOUGHT PARTNER

Dr. Daniel Freeman, Ed.D.

I create structured conversations for leaders who already carry the answers.

Not coaching. Not consulting.

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EXECUTIVE THOUGHT PARTNER

“The Community Doesn’t Believe in Us Yet”

Case Study 06 • Small Institution Athletics • Revenue Strategy & Presidential Alignment

Representative case. Details generalized to protect confidentiality.

THE LEADER

A newly appointed Athletic Director at a small institution — stepped into a role that carried significant expectations and a quiet crisis underneath them. Two programs weren’t hitting enrollment numbers. Both were still receiving scholarship funding. The math wasn’t working, and the community — the donor base, the local relationships, the people who would need to believe in athletics enough to invest in it — wasn’t fully bought in.

He had the title. He had the vision. What he didn’t have was a revenue generation background, a warm donor network, or a quick path to either.

WHAT HE SAID THE PROBLEM WAS

> *“I need to start raising money and building relationships, but I don’t know where to start — and I can’t promise the president big numbers right away.”*
>
> **— The AD, entering the conversation**

WHAT THE PROBLEM ACTUALLY WAS

Three problems, layered on top of each other, all arriving at once.

- Structural: two programs bleeding scholarship dollars without enrollment numbers to justify them.
- Relational: a community that hadn’t been cultivated — not hostile, just unconvinced.
- Presidential: a leader above him who needed to see strategic thinking, not just activity.

You can’t fundraise your way into a community that hasn’t decided to believe in you yet. And an AD asking for patience without a plan looks like an excuse. An AD presenting a targeted relationship strategy with a realistic timeline looks like a leader.

The work wasn’t just building a fundraising strategy. It was building the conditions in which fundraising could eventually work — and communicating that architecture clearly enough that the president stayed in the room with him.

THE WORK

Program Narrative: They built an honest assessment of the two underperforming teams — not to make excuses, but to develop a narrative that was strategically defensible. If scholarship dollars were going out without enrollment numbers coming in, the president and any future donor needed to understand why the investment still made sense and what the plan was to right-size it. Transparency with a strategy is leadership. Silence is liability.

Community Mapping: They mapped the relationship landscape deliberately. Not a broad campaign — a deliberate sequence of conversations designed to build institutional credibility before any kind of ask. Who already had a connection to the institution, even a dormant one? Who had a personal tie to athletics, to student success, to workforce development in the region? They were looking for believers first, donors second.

Network Leverage: They leveraged both networks — Dan's advancement relationships and the AD's own community ties — to identify targeted entry points. Relationships that could be activated quickly, conversations that could build credibility without requiring a track record that didn't exist yet.

Presidential Communication: Every update to the president would be framed around strategic alignment — what relationships were being built, what partnerships were being explored, what the 12-to-24-month arc looked like. Not "we're working on it." A specific, sequenced plan that showed the president his AD was operating like a strategist, not a fundraiser in over his head.

THE STRATEGY ARC

01 BUILD BELIEVERS	02 BUILD NARRATIVE	03 ALIGN UPWARD	04 BUILD REVENUE
Identify and activate community relationships already adjacent to the institution	*Develop a transparent, defensible story around program investment and future vision*	*Frame every presidential update around strategy and sequence, not outcomes yet to come*	*Let gifts follow the foundation — trust, credibility, story, then the ask*

> **THE REFRAME THAT CHANGED THE TIMELINE**
> *We are not behind. We are at the beginning. And the beginning, done right, is what makes everything else possible.*

THE SHIFT

The AD stopped trying to solve a fundraising problem and started solving an alignment problem. The revenue would follow — but only after the relationships, the narrative, and the presidential partnership were in place.

Trying to close gifts before any of that existed wasn't just premature. It was the fastest way to damage the credibility he was still building.

THE OUTCOME

A targeted relationship strategy — not a broad fundraising campaign. A sequenced community engagement plan built around the networks they already had, with milestones measured not in dollars raised but in relationships opened, conversations had, and institutional credibility built. A presidential briefing framework that positioned the AD as a strategic partner.

The big numbers weren't coming in the first few months. Everyone understood that — and more importantly, everyone understood why, and what was being built in their place.

> *"I stopped feeling like I was failing because I wasn't closing gifts. I started understanding that what I was doing — the relationships, the strategy, the alignment with the president — that was the job. The gifts come after the foundation is built."*
>
> **— Athletic Director, Small Institution**

WHAT ETP DID

Helped an AD see that revenue generation isn't a skill you either have or don't — it's a system you build deliberately, starting with trust before you ever get to transactions. Reframed his timeline from a liability into a strategy. And gave him the language to bring his president along for the whole arc — not just the wins.

The foundation first. Always the foundation first.

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