



Chief Philanthropy Officer Search Second Interview

Candidate: Lina Lee
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Present: Nancy Coughlin, Debra Ritchie, Corey Paris, Christina Johnson Wolff
Karen Brennan (notetaker)

Questions:

- 1. You are very new to Connecticut, so you would be building a network here. What strategies would you employ to getting started to know the community and build your network?**
 - When I started the legal services in 2019, a lot of the people that I met ended up helping the organization. So, that's when I started engaging people.
 - I was the primary fundraiser for this organization so I made sure that I was everywhere.
 - I would go to the community social events. I would go to the partner events, the elected events – I would go and just meet everyone that I could.
 - At the time, it was all about housing, so I was making sure to show up at the housing events.
 - Being in Connecticut is a new environment for me. But I just really love being engaged with the people and the community and with like-minded people because that's what I connect most with. And so, it's incredible how social I love being. And, you know, I really enjoy these connections.
 - So, for me, it's just a matter of time because I'm very proactive. I will get to know the clients that you serve. I will get to know the staff. I'll be at your events and I'll make sure that I am very familiar with people who are supporting and could be supporting P2P.
 - I don't think that I have any qualms about being new to Connecticut because I've been in new roles before and I've met a lot of people through new roles, and for me, it's such a pleasure. It's not really even part of the job to meet people.
- 2. At your last organization, you raised an all-time high of \$6 million dollars. How much of that was individual donors versus foundations and other grants?**
 - So, I would say that about 60% of the budget came from city grants – because at that time the organization started, that was what helped us get off the ground. It was a city grant that helped us get started with the work that we were doing. The rest is individual donors and foundations.
 - The issue with city grants is that the money is very restricted and there is a lot of reporting.
 - Largest foundation donor was Robin Hood Foundation, with smaller foundations following.

- One of my goals is that I wanted to make sure that our budget was not relying on just government grants because they are so unreliable and they are just a lot of work. And sometimes those grants didn't always align with the work that we wanted to do.

3. Did you have any event fundraising revenue?

- We did. We did at least two fundraisers a year, and this new fundraiser was really to reach potential new funders. Our target at that time was young professionals who knew about housing who worked in the city. And so, our fundraising events were held in the city. Ticket prices were a little bit lower, but our goal at that time was just to get more people interested so that their potential giving could grow over time. And so, although our events are not the gala level, it was a nice event with people who wanted to give. And the next step would be making sure to cultivate those relationships so that they could grow more professionally to a bigger donation.
- **(Asked about size of donations, and number):** I would say our donations were small, they were not large. I would say that the average giving for a person would probably be about \$200. The number of individuals giving to us was probably over 300 people. And for every donation that was given, I would write a personal thank you.

4. Describe your experience with [capital campaigns, planned giving, grants].

- No experience with planned giving.
- I did try to do a capital campaign, but we just didn't have enough time because it was just taking too long. It was a huge investment and I needed that money in the door today so we could build out an office two years later. It took that long building, not an office, and I started it and we had a lot of potential. But at the end of the day, I said this office is needed now because otherwise our clients will be going into a shared workspace or not be able to reach us at all. And so, we picked a location right in front of the train station. It was extremely expensive. They were charging \$20,000 for a very small office. But, you know, we needed it done very quickly. And so that was a priority. And so, we had to raise that money differently.

5. What are some innovative fundraising ideas you've implemented in previous roles?

- So, persistency. I think it's one thing that I am very persistent. I have been told no many times. And so, you know, one thing I've learned is they can only say no so many times. It really starts with a very strong message. And it starts from the time when we're starting from base zero. Creating a message and creating a logo. Having all of your public facing material in a way that you want it to look like.
- So, if you're an organization that at that time it was for me – we're growing. And we're going to be the front-line organization for a lot of the legal services. And so, we were very much on social media. We were very much in your face. Like you're going to get newsletters from us once every month, if not twice a month. We're going to be in the New York Times. We're going to be in the press and you're going to hear our name over and over again. That was our way of really, you know, making sure that we sound familiar.

- And then we had fundraising events that were very much local. But we had a lot of community leaders that came out and supported us. We were part of their events. And so, our name was out there.
- And then with the giving, it's connecting with each potential giver. And I made those calls. I went to their offices. And I had long meetings with them. As long as you're willing to meet with me. I will spend my time to make sure that you fully understand the work that we're doing.

6. Have you been involved in galas and big events?

- Yes, of course. I'm part of a lot of bar associations, and even now in New York, and I'm still part of all of their gala planning. I'm going to a big one in Connecticut in a few weeks. I like helping because I've done these events for a very long time. And so, part of the work that I would do as a volunteer would be to call sponsors, make sure that they know how they can participate. I regularly go to and help with on many different levels.

7. What's the most creative campaign or initiative you have created?

- Well, I initiated my whole organization. That was my biggest campaign. And so, I put this organization on the map. And I left it in a place where people can really remember it. And I really made this easy with this organization for the next five, ten years. They want to just maintain what they have now. And I think it was really the work, obviously, that we did. But, my job was to make sure that everyone knew about the work that you were doing.

8. What do you think was the most important and special thing that you were able to do in order to grow your organization so quickly?

- I think when an organization grows, first you have to accept that things will change. It's not the same anymore. It's a small group. A small group is sometimes easier because, you know when you are working closely together, everyone is. It's easier to be aligned and on the same page as yours.
- You know, one thing, though, that I think is good for growing staff is that constant reminder why they're there because turnover is expensive and turnover is really bad morale. And once it starts, it's really hard to stop that train. And you forget that for new people especially, you know, they don't really know why they're there. If you work together for five years. And yes, you can say it, but if you're new and you joined for even a year, then you sort of forget or you just don't know or never knew why you were there. And so, I think being fully invested in the developments but the longevity of the staff. And I can tell you that as a staff with the greatest number of years of experience, you know you're not going to find someone better, an expert consultant that can. That knows more about the organization and what its needs are. And so, you know, we had, you know, for example, a grant person who never done Brants before. And over the course of five years, she became the expert in brands. And it's because she learned this work because she wanted to. And at the end, you know, she's irreplaceable because there's no one else outside the organization that can do this job.

- So, I think really investing in staff and I think a growing staff just for remembering that even though it's getting larger, each person is still going to wonder why am I here at work today? And you just have to remember, remind them why. And they can look very different in many different ways. But I think what a lot of people really like about working, especially in person now more so than before is really feeling that connection.

9. What are the other reasons for your soul searching and why you felt like this was the right time to leave your job? And as an executive director and founder, what do you feel like you could have done better in that role?

- I could not have done anything better. I did my very best and I can tell you this work was everything and I invested a lot. I invested a lot of my time. My thoughts, every single thought that I had every day went into this organization. I knew what every person was feeling, thinking coming into work. I knew what our clients' names were. I knew their families. I've worked with them for many years, even before. And so, I can tell you that being that involved means that you reach a point where, you know, this is all that I've known. And at some point, I said, I think I reached the most that I can for this organization. And I said, I'm going to make sure the organization reaches this budget and this number of board members and this staff, and then the organization will want to stabilize, and I'm not going to be the stabilizer because I'm a founder.
- And that means I am going to push this organization to where maybe they might not want to go. And I reached a point where I said I reached my goal. And I did like a feeler in the organization and the board members, and they worked really hard and we worked through a really tough time. And not only did they get through it, but we exceeded expectations. But I wasn't done it yet.
- And so, for me and it wasn't any of the board members or the staff, but I said, you know, this organization needs a new leader, it needs someone who wants to be where the organization wants to be, which is, you know, it's being stable, they are doing great work. It's a staff of 30. They're doing great work with this budget now. They've been there so much and I left them in a very good place. And I can say that, you know, they don't have to worry. The new ED. He doesn't have to worry about whether or not they're going to make payroll or if they need to worry about what the budget will look like. And it should be there. It should be there. But for me, I would not have stopped. And that's why I'm not on the board either. Because you wouldn't want me on the board as a new AD because I will always have high goals for the organization. And I will always, you know, see where we can grow and be bigger because that's always my drive. And I think, you know, when the time comes, when the organization wants me as a board member, I'm happy to help. But at this time, it's just better you left with the new executive director and new base.

10. Can you describe a time that you faced a difficult fundraising conversation or situation with a staff member or donor?

- I didn't have anyone else helping, and so I was really the person that had to deal with it. And so, when it came down to the decision of whether we were going to accept a new source of funding from the city, which would change the model of work in the way that we provided service. I

single handedly made that decision as saying no, because it doesn't align with our mission. And our mission at that time was very important.

- And I absolutely knew and I foresaw that this money, it might look nice, but once we start having to work for this money, this organization will be very different. And a lot of staff at that time did not agree. And, you know, they were thinking about their salaries. They said, it's more money. Why can't we just get more money? I said, it's the math that doesn't really work like that. It doesn't mean that you get this money and your salaries go up. And no, there's so much more that has to happen in between and it doesn't translate. And I said, you're not going to end up doing the job that you started here for if we take this money. And some people didn't trust me. And it's only a few years that we saw where this grant money went and how it turned out. A lot of legal service that took this money ended up not being able to meet their goal numbers and ended up having to pay a penalty for taking this money. And so, they had a huge turnover because it came with extremely high caseloads. And a lot of their attorneys quit and never came back.
- And then, you know, the organization had this huge morale downfall. And they can't recover because once you have something like that, just it's hard to come back from.
- So, in the end, I did make the right decision for the organization and for our clients. It felt very alone and lonely in that decision. And I did get criticism for it, but I knew that it was the right decision and it was looking back now. But yeah, even small challenges of having to even make payroll and things like that, that's something that a new organization of any size would have to deal with.

Candidate's Questions:

1. Where do you see this organization donor base going and how do you see it growing in the next two years?
2. What is it that you want to reach and why?