



The Essential Leadership Guide for Fundraising Professionals

Tools and Tips for Success

By David Langiulli

About the Author

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David's professional background spans both the university and corporate sectors over nearly three decades. In higher education he successfully served in positions of progressive responsibility in fundraising and technology transfer/licensing. In the corporate sector he led market research, product development, sales, and marketing initiatives.

In the spring of 2015 David stepped down from his fundraising leadership role at Princeton University where he led a team of ten professionals that was responsible for \$35million in annual support for the University's mission. Prior to this, David served as the Director of Development for Stony Brook University's College of Engineering and Applied Sciences.

In the corporate sector, David's experience culminated in reorganizing, invigorating, and transforming the licensing division of an early-stage product development company in San Francisco. In that role, he built and led a team of three dozen individuals that included researchers, artists, engineers, and product managers.



David holds a master's degree in management and business administration from Stony Brook University, a master's degree in materials science from Columbia University, and a bachelor's degree in physics-engineering and mathematics from Washington and Lee University. He is retired from his mountaineering avocation, after having scaled peaks throughout North America and Europe. David is now practicing to become proficient in Jiu Jitsu and like the founding fathers of the United States of America he values life, liberty, and the pursuit of happiness.

David is the creator of [The Essential Leadership Journal](#) and he publishes [Fundraising Leadership](#), a blog for nonprofit professionals interested in self-development, leadership, and management. Some of my philosophy and approach to working with leaders is expressed in his blogposts. David has had the honor to coach senior leaders at several Universities and other nonprofit institutions across North America including those at: Catholic Health Services of Long Island, Camp Oochigeas, Colorado State, Columbia, Franklin and Marshall, Lehigh, NYU, Stanford, UNICEF, University of California San Francisco, University of Wisconsin, Washington University, University of Michigan, Wesleyan, and Yale.

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What Kind of Fundraising Leader Are You?

Growing up my father used the expression "twerp" as a pejorative slur for any leader not meeting his high standards for character.

Yes, that's a bit harsh. Yes, that's judgmental. Yes, that's dismissive. And, yes, there is wisdom in making such assessments of leaders sooner, rather than later. After all, the world is not yet replete with heroes (or, heroines) who step into leadership roles. While I was blessed to have worked with some wonderful leaders in the corporate and non-profit sectors over 30 years, I can also report that I had my fair share of encounters with twerps, jerks, and other petty tyrants. And, need I comment on similar "characters" we observe on the modern political stage at the local, regional, national, and global level?



This is nothing new. Recorded history gives us many examples of leaders to emulate (or not) from Hammurabi to Hitler. My own inclination is to follow the path of the "Bodhisattva," or one who is motivated by great compassion to achieve enlightenment not only for my own benefit, but for the benefit of all sentient beings.

I recognize that the Bodhisattva path is tall order, and it's not for everyone. As a leader, knowing who you are and leading from there is a very powerful start. The trick is to become aware of your authentic self and understand your impact on others. The next tip is to always remember to tap into this strength when leading. On the awareness front, there are several good instruments for gaining insight into behavior (Myers-Briggs), motivation (Enneagram), saboteurs (Positive Intelligence), and strengths (Strengths Finder). While these assessments are helpful, they may not go quite far enough.

Being aware of our most authentic and compelling leadership style is one thing. Consistently leading from that style can be another matter (especially for fundraising leaders who are often given advice early in their careers to accommodate their style for various situations and donor personalities). One way to develop consistency is to tap into our inner authority. In coaching we call this inner leader our "Captain" who has access to unlimited wisdom, compassion, courage, clarity, and certainty. Our Captain can help us stay true to ourselves, even when external circumstances or people attempt to steer us off course.

I recommend that you also consider the following inquiry: "Who am I, and, what impact do I want to have in the world?" Simple - but not easy.

[JOIN US for the Annual Advancement/Development Leadership Weekend if you're interested in strengthening your leadership style.](#)

This Requires Total Concentration (Bruce Lee Paraphrase)

Martial artists can focus their mental attention and bodily energy to apply physical forces that astonish most other mortals because the latter cannot see beyond the distractions of their own busy, active minds. Especially today, when electronic media and the internet at first seem appealing, yet in the end cause leaders to be distracted and lose focus.



Text message. Email. Phone call. Tweet. Pandora. iPod. Video game. Facebook. Pinterest. Netflix. Hulu.

Now...where was I? Oh, yes - focus.

Fox News. CNBC. Politico. CNN. Talk radio. The New York Times. The Wall Street Journal. Bloomberg. Reuters.

What was I doing? Oh, yes - preparing for a board meeting.

Napoleon Hill, in his *17 Principles of Success*, described a quality he called “Controlled Attention” as the ability “to focus the powers of [the] mind upon the attainment of a definite objective and to keep it so directed at will.” If we are often distracted, bouncing from activity to activity like a pinball on steroids, how can we achieve or accomplish anything worthwhile? “Multi-tasking” is an oxymoron!

So, what can fundraising leaders do when we are either assaulted or tempted by the barrage of today’s electronic distractions? I do have a number of simple recommendations:

- Cancel your cable/satellite TV service. Throw out all radios, iPods, gaming consoles.
- Read only one literate newspaper each day.
- When with people, place your cell/smart phone in “airplane” or “silent” mode, and be fully present for the people who are with you.
- If you must check and respond to email, do so only three times each day (morning, around lunchtime, and late-afternoon).
- Rise early and meditate each day.
- Get at least eight hours of sleep each night.

I recognize that what I am suggesting here is a radical departure from the way many individuals act these days. Who among us has the courage to reclaim their focus and lead?

Creating A Fundraising Mastermind Alliance

A term “Mastermind Alliance” was introduced into the popular lexicon in 1937 by Napoleon Hill in the self-development classic, *Think and Grow Rich*. Hill described a Mastermind Alliance as “the coordination of knowledge and effort, in the spirit of harmony, between two or more people, for the attainment of a definite purpose.” Nice. So how does one form and operate such a group, and to what end?



The first step in establishing a Mastermind Alliance is for the leader (or co-leaders) to adopt a purpose, intention, or “stake” for the alliance, and then to choose individual members whose backgrounds make them valuable for supporting the purpose. For example, development leaders often establish and facilitate councils or boards to help guide fundraising efforts. In my own past, I established a group of business executives that met as a roundtable to advance the mission of a business school from which they had graduated. It is essential to consider each candidate for membership in the light of his or her ability, personality, and willingness to help and cooperate with other members of the group.

Once members are recruited, the next step is to establish a regular date and time for the the alliance to meet. The meeting can be conducted in person, or via telephone/video call. Depending on the context, the group can meet as frequently as necessary. The environment should be one where everyone has an opportunity to connect, and where each member may speak freely, confidentially, and without fear of judgment from the others.

Once the group is established, it is incumbent upon the leader (or co-leaders) of the alliance to ensure that action is forwarded and learning deepened in support of fulfillment of the group’s purpose. The leader or co-leaders should come to each meeting with content or questions of interest to the group purpose while keeping everyone aligned to the stake or intention. The major strength of such an alliance consists in the blending and contribution of all its members.

There are no hard and fast rules as to the number of individuals recommended for an alliance. The number should be guided by the nature and magnitude of the intended purpose. Groups of 4, 6, 8, 12, and up to 24 all work well.

Right now, I co-lead a Mastermind Alliance (a.k.a., a “tribe”) of leaders from the non-profit and corporate sectors interested in deepening our leadership capacity. Our discussions focus on principles outlined in the excellent book entitled: *The 15 Commitments of Conscious Leadership*.

CALL ME at 415-273-9890 to explore becoming part of the *Conscious Leadership Tribe*.

How you may be Sabotaging Yourself

You're restless, and so am I.



In 2013, Penelope Burk surveyed more than 1,100 fundraisers and found the average time someone stayed in a fundraising position was 16 months. 16 months! And we know that it typically takes at least 10-12 months to integrate and acclimate an individual to become productive in an organization.

Wow!

A.L Haggerty from the Virginia Commonwealth University presents an excellent overview of the organizational impact of this turnover (costs, relationships, etc.) [in her dissertation.](#)

Another impact on you of this restlessness can be self-sabotage.

In his excellent book, *Positive Intelligence*, Chizard Chamine defines "Saboteurs" as: "internal enemies...a set of automatic and habitual mind patterns, each with its own voice, beliefs, and assumptions that work against your best interest." In particular, Chizard describes the "Restless Saboteur" as a mind pattern that is frequently in search of greater excitement in the next activity. It is rarely at peace or content with the present moment or situation. And, yes, I'm intimately familiar with this saboteur because I was restless for much of my adult life.

Go to <http://www.positiveintelligence.com/assessments/> for a complimentary (and quick) assessment of your saboteurs.

One of the characteristics of the Restless is that s/he stays busy, juggling many different tasks and plans. Sound familiar? Many of the fundraising leaders I've observed over the years see this behavior as a strength--until it isn't. Impatience coupled with a fear of missing out on other more worthwhile experiences (or, positions) manifests in relentless frenzy and chaos. The consequence is often one of burn-out, combined with the inability to build anything sustainable or lasting. Trust me--I know. Here are some of the voices in the head you may want to aware of:

How you may be Sabotaging Yourself (cont'd)

- I'm bored.
- Can't anyone around here keep up with me?
- Ooh, that position at _____ looks exciting.
- I wonder what it would be like to live in _____?
- Wouldn't it be cool to try_____.
- These guys just don't get it. I need to move on.
- I'm not learning anything here.
- Same old, same old.
- Really? Do I need to go through that again?
- Life is too short for this BS.

Sure, at any given time, these may very well be valid concerns. However, be careful, and be aware of your mind. If some of the above thoughts (or others with which you are more familiar) are recurring patterns, and they collude with your high achieving and success-driven nature, then it may be time to take a pause. Just at the moment when you starting to feel a bit restless, it can be helpful to ask yourself: "Am I being restless here?"

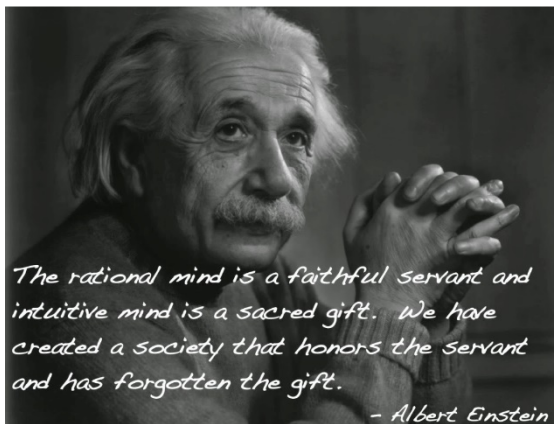
If your Restless Saboteur is strong, another way to neutralize it is to ask yourself Byron Katie's Four Questions:

1. Is this thought true? (Yes or no. If no, move to 3.)
2. Can you absolutely know that it's true? (Yes or no.)
3. How do you react, what happens, when you believe that thought?
4. Who would you be without the thought?

I've found these questions extraordinarily helpful in quieting my own Restless Saboteur. Even if you choose not to ask the Four Questions, I believe that if you pause and begin to ask if you're being restless (especially around a change in employer), you'll be in a better position to make an informed choice.

The Best Fundraisers Use Their Intuition

Have you ever noticed great leaders can make decisions with very little information? They go on instinct, gut feeling, or a hunch. These leaders tend to have very quiet minds. They are aware. They "listen" for the inspiration that informs their good choices. Also, they are willing (at times) to ignore their own analytical minds, as well as rational advice from those on their team. This is no easy task, when many of us have spent many years strengthening our rational/analytical capabilities.



In the context of leadership, I am often asked about strategy formation especially in light of data (or lack thereof). It would appear that we are now obsessed with data. We've become so data-driven that I often see leaders get stuck in the paralysis of analysis. I will assert that nothing significantly innovative or creative was ever accomplished by analytical, deductive reasoning. So how on earth did we make any progress prior to data? Here's how: intuition.

Intuition is the innate human ability to understand something immediately, without the need for conscious reasoning or data. Thomas Edison had this ability. He claimed that his invention of the phonograph was an act of pure intuition. Einstein did, as well. While we all have it, we often fail to use it. For me, intuition sometimes manifests as a visual image in my mind, a metaphor, or just a word that pops into my head. In my coaching work, I've noticed that successful fundraising leaders often listen to these intuitive "feelings," while struggling leaders do not.

Here are five good reasons to trust your intuition:

1. It always knows best. When drowning in data, your intuition will see the pattern from which to move forward.
2. It does not lie. According to the intuitive genius, Mark Twain: "There are lies, damn lies, and statistics."
3. It will guide you perfectly. Since intuition comes from a source that is beyond the rational/analytical mind, it is free from the "noise" that pollutes the signals.
4. It provides clarity. Intuition is like the morning sunshine that burns off the accumulated overnight fog. When present, vision becomes clear.
5. It offers better decisions. Steve Jobs famously followed his own iconoclastic decision-making impulses. He implored his colleagues at Apple to "have the courage to follow [their] intuition."

[REGISTER NOW](#) for the [Coaching Essentials for nonprofit leaders online course to strengthen your intuition with donors.](#)

Fundraising Strategy: The Art of Saying “No”

That's right. For a profession consisting of tens of thousands of individuals trained in the art of inspiring folks to say “yes”, the most important skill fundraisers (especially fundraising leaders) can cultivate is saying “no.”

You may ask: "How can that be?", and you may be thinking: "I've been conditioned much of my professional life to say “yes.” And therein lies the rub. Many of the fundraising leaders with whom I work as a professional coach have a very strong "Pleaser Saboteur." A “saboteur,” as defined by Shizard Chamine in his NY Times best-selling book *“Positive Intelligence*, is an automatic and habitual mind pattern with its own voice, beliefs, and assumptions that works against our best interests. A saboteur is insidious; it works in the shadows in a gradual, subtle way with harmful effects.



In particular, the Pleaser Saboteur indirectly tries to gain acceptance by helping, pleasing, or flattering others. The negative impact of the Pleaser is often one of burnout, as I observe fundraising leaders saying “yes” to far too many unimportant (although perhaps urgent) tasks that come their way. So what is a leader to do? Just say “no?” As simple as it seems, that would be a very good start. Greg McKeown in his excellent book *Essentialism: The Disciplined Pursuit of Less* eloquently expands on the inquiry. McKeown, a writer, speaker, and Harvard Business Review blogger, offers concrete advice on how to deliberately focus on the vital few priorities that really count - and dispense with the rest. McKeown observes (as I have) that many professionals are over-busy and over-committed. They continue to say “yes” to ever more commitments and deadlines without asking the following questions:

Is this truly essential?
How important is this to me?
What do I really want here?
Is this really how I want to choose to spend my time?
How is this aligned with my values and purpose?

I believe if you are truly honest with yourself (and ignore the voice of your Pleaser) when answering these questions, you will say “no” to upwards of 90% of the requests and opportunities that come your way. By doing so you will have a much more powerful impact as a leader on your world, and the people around you.

I highly recommend McKeown's book, and I encourage you to incorporate more “no” into your life.

Plan Your Work and Work Your Plan

Dwight D. Eisenhower is often cited as saying that the plan for D-Day was not as important as the process for planning for D-Day. A very useful tool that I've come across for building an individual annual plan is the OGSM model (Objective, Goals, Strategies, and Measures). An OGSM is a one-page document that can serve as a powerful planning and review tool throughout the year. The basic four OGSM categories are as follows:



Objective—A statement of major definite purpose for the year such as: “Expand Donor Relationships.”

Goals—The aims associated with the objective such as: “Ten new donors by year end.”

Strategies—The specific actions to be put in place to reach the goals and support the objective such as “Expand the number of meetings.”

Measures—These are the metrics that quantify activities and include dates when actions are to be completed, such as: “Twenty-five new prospect meetings by Q3.”

[CLICK HERE for a complimentary OGSM Template.](#)

While the OGSM is a guide for the entire year, it is helpful for each individual to pause just before the beginning of each quarter and create a 90-day plan. Fundraising leaders can help their teams stay on course throughout the year by encouraging their frontline fundraisers to create the content for a 90-day plan with just a handful of components:

- 1) Closing gifts - Which open gift discussions with donors do I intend to close in the coming 90 days?
- 2) Gift proposals - Based on previous discussions, are there any formal gift proposals that I intend to present to donors in the next quarter?
- 3) Donor visits - Which donor visits are already scheduled, and which donors do I intend to meet in the coming 90 days?
- 4) Internal meetings - What important meetings with stakeholders (other than donors) are already scheduled, and which do I want to schedule in the next quarter?
- 5) Learning and Growth - Are there any conferences, workshops, webinars, or other professional development opportunities on the horizon for the coming 90 days?
- 6) Personal Leave - Do I have any vacation or other leave planned for the next quarter?

Plan Your Work and Work Your Plan (cont'd)

For the fundraising leader or manager, there may be other categories of activity such as: systems, communications, marketing, budget, and more. The aim here is not to put every activity into the quarterly plan (that's what we have task lists and calendars for). Instead, consider the annual OGSM and then choose the significant milestones that are to be accomplished within the next 90 days. The quarterly plan should fit onto a single page, and be displayed prominently in the workspace (or reviewed regularly if kept in electronic form).

And, let's not get too hung up on data. In fundraising these days there's lots of counting (a.k.a. "metrics"). It's important to remember that fundraising is fundamentally a relationship (not data) driven enterprise. By all means count what is essential, and also keep in mind what Albert Einstein said: "Everything that can be counted does not necessarily count; everything that counts cannot necessarily be counted".

Now, here comes the kicker. It is incumbent upon the leader to convene a quarterly meeting with all of his or her teammates in order to have each member "report out" on their progress against plan for the previous quarter. This quarterly review creates trust, transparency, and accountability, and is a best practice for nearly all high-functioning and high-performing fundraising teams.



Finally, one word on visioning (or imagining) the future. Many leaders I know take time in December or January to create a vision board for the upcoming year. It's a tool that can clarify and focus the mind through a collage of visual images. According to Jack Canfield, a vision board is a "powerful tool [that] serves as your image of the future - a tangible representation of where you are going. It represents your dreams, your goals, and your ideal life."

I (and several clients of mine) choose to use a structure called "the wheel of life" for this exercise. The wheel of life is a structure used by professional coaches to encourage clients to consider and rate (from 1 to 10, with 10 being absolutely satisfied and fulfilled) each area of lives and focus on those areas that may need attention. It typically takes the form of a pie which is sliced into eight wedges with the labels: Career, Family & Friends, Significant Other/Romance, Fun & Recreation, Health, Money, Personal Growth, and Physical Environment. [CLICK HERE for a complimentary Wheel of Life template.](#)

For the vision board, select images that resonate strongly with you for the upcoming year in those eight areas of your life. These images may have some of your goals and dreams embedded in them. The result may be printed on photographic quality card stock. I encourage you to put it in a prominently location where you see it regularly as a reminder of what is important for the upcoming year.

Keeping a Journal



The practice of leaders keeping a daily journal goes back to antiquity with notable examples from Julius Caesar and Marcus Aurelius. A journal is a place where you can reflect, plan, capture ideas, and record content from important meetings and telephone conversations.

Some essential “best practices” for keeping a leadership journal are:

Essential Journal Practice #1—Daily Morning Pages

In *The Artist's Way*, Julia Cameron describes Morning Pages as: “one to three pages of longhand, stream of consciousness writing, done first thing in the morning. *There is no wrong way to do Morning Pages*—they're not high art, nor even ‘writing.’ They are about anything and everything that crosses your mind—and they are for your eyes only. Morning Pages provoke, clarify, comfort, cajole, prioritize and synchronize the day at hand. Do not over-think Morning Pages: just put [up to] three pages of anything on the page...and then do three more pages tomorrow.”

Essential Journal Practice #2—The Week Ahead and the and Day Ahead

After the morning pages, review your calendar for the week (on Sunday) and day (every day). Plan and organize your activities by writing down your priorities in each of the following categories: Intention for the week/day, Business/Work, Family and Friends, Significant Other/Romance, Fun/Recreation, Health/Wellness/Fitness, Money, Personal Growth, Physical Environment.

Essential Journal Practice #3—Take Notes

For each important meeting or telephone conversation—TAKE NOTES! Record essential tasks, commitments, and action items. Begin a new page for each conversation at the top of a new page. Label the date, time (am/pm), and whether the conversation was in-person, by video, or telephone. Write the name(s) of the person(s) involved and the organization(s) represented.

[CLICK HERE for an excellent writing journal that is designed to keep you on track as a leader in every aspect of your life.](#)

Essential Journal Practice #4—Reflection

At the end of each day, take time to reflect upon what transpired. What did you accomplish (review the Day Ahead)? What needs to be rescheduled, delegated, or dumped? What are you grateful for? Where could you have done better? On Saturday, review and reflect on your plan for the week. If you are focused on diet and exercise: what did you eat today, and how did your exercise go (activity, duration, intensity).

Essential Journal Practice #5—Ad Hoc Notes

Be sure to record any creative ideas that come to you during the day. Label each entry as “idea”, “inspiration”, “task”, etc. Transfer to electronic organization system, as necessary.

Essential Journal Practice #6—Review and Celebrate

As you approach the end of the journal space in about 90-120 days, read and review all your pages. Marvel at what you've accomplished and celebrate! Recommit to anything that slipped through the cracks.

With People, Slow is Fast

In the 1970's television sitcom *Taxi*, Jim ventures over to the DMV with his buddies to take his driver's license written exam. What follows is one of the [most memorable and humorous exchanges in sitcom history](#).

It's a skit that comes back to me over and over again as we are encouraged to SPEED UP in our ever changing world. Often, we're racing from meeting to meeting, taking the next five-minute call, banging out the next email, and responding to a text. I really wonder if we are creating relationships with all of this busyness? Contrary to the popular culture, I assert that we are not. We've got lots of activity - and very little depth.

Relationships (with donors, bosses, subordinates, and peers) are built through long, slow conversations over time. Emails and text messages don't cut it. Relationships blossom when we focus on the other person, and that person comes to know that we are there for them. "Being with" someone is a lost art, and yet, it can be rediscovered.

I'm fond of Stephen Covey's expression, "With people, slow is fast, and fast is slow." When we slow down, people and the world come into focus. It is from that place that we can see (and seize) opportunities, while being of service to others.



I will share that I find this incredibly challenging. My own mind is often very speedy, and technology catalyzes that speed. So, what is one to do? I recommend going for a walk. Get out of the office and have lunch with someone. Chew and taste your food before swallowing. Sit with a colleague and tell him or her what you really appreciate about them. Be curious. Ask heartfelt questions. Breathe. And, when you are tempted to bounce off the walls like ricochet rabbit, remember to ask:

Whaaaatttt.....Doessss.....AAAAAAA.....Yelllllllowwww.....Lighhhtttt.....Meeeannn??????

[REGISTER NOW for the Annual Advancement/Development Leadership Weekend to learn the art of slowing down.](#)

Recruiting Great People

Human resource professionals and hiring managers often ask me if there are certain qualities to look for in prospective new hires that are likely to make them extraordinarily successful in their roles. While there are no absolutes, I have found that there are a few characteristics that if carefully screened for can yield excellent new-hire results.

Of course, it helps to have a rigorous recruitment process (including resume reviews and initial phone screenings) that develops a number of strong, talented, and competent candidates. After that process, multiple face-to-face interviews of a small pool of candidates by a diverse hiring committee who are prepared to ask penetrating questions about character (not competence) will get at the heart of the matter.

Take a look at the character and personality qualities which I regularly looked for when considering new hires. While I am indebted to Napoleon Hill (*Think and Grow Rich*) and W. Clement Stone (*Success Through a Positive Mental Attitude*) for the initial inspiration of this list, in most cases I have put my own spin on these. I should point out that nearly all of these qualities can be learned or acquired over time with practice. They are not innate. If you are recruiting someone to your team, I strongly recommend you consider evaluating candidates using these qualities, in addition to any other specialized knowledge that may be required.

Positive mental attitude

This attitude can often be described by such words as optimistic, courageous, generous, tolerant, tactful, kind, and having good common sense.

Going the extra mile

Live by the golden rule, and render more and better service than was expected.

Definiteness of purpose

A dominating idea, plan, or purpose emotionalized by a burning desire for its realization. The ability to set goals and make specific plans to achieve them.

Enthusiasm

Intense enjoyment of one's work and profession.

Personal Initiative

Plan one's own work and work one's plan. "I do it now" attitude.

Pleasing Personality

A professional appearance and demeanor. Can demonstrate the virtue of humility.

Learning from Defeat

The ability to learn from substantial personal and professional setbacks.

Controlled Attention (also perseverance and persistence)

Can stay focused for long periods of time. Can stick with a projects for 12, 18, and 24 months while overcoming obstacles.

Teamwork

Works well with others. Can seek advice and help from others to accomplish goals.

Time and Project Management

Manages multiple priorities and projects simultaneously. Stays organized. A time and place for everything.

Creative Vision

The ability to use imagination constructively. Can "paint a picture" in the mind of another with words.

Accurate Thinking

Separates fact from fiction. Can implement practical ideas or plans to achieve a particular goal.

Retaining Those You Recruit

In the marketplace for fundraiser talent, it is well known that demand currently outstrips supply. Consequently, advancement and development leaders often say that one of the most significant challenges they face is the retaining of frontline fundraisers and managers. While the economic forces of supply and demand are putting upward pressure on salaries, a common misconception about fundraiser retention is that it's "all about the money."

That's a management and leadership cop-out. We know from multiple published annual employee satisfaction surveys that, while compensation is a factor, the other four primary aspects that affect employee engagement retention include opportunities to use skills/abilities, job security, communication with management, and relationship with immediate supervisory (see, for example, the *Job Satisfaction and Engagement Survey* by the Society for Human Resource Management).

In addition to economic forces, which do play a part, what are some of the other real reasons people leave? According to employee retention expert Leigh Branham, author of *The 7 Hidden Reasons Employees Leave: How to Recognize the Subtle Signs and Act Before It's Too Late*, while most people indicate that they are leaving for more money or a better opportunity, 88% change jobs because of negative factors in their current workplace, ranging from subpar people management to poor cultural fit. Branham explains: "Citing increased pay and more opportunity is a convenient thing to say, and managers are all too willing to accept these reasons." Branham goes on to identify the top seven reasons people leave as follows:



- 1) The job or workplace was not as expected.
- 2) The mismatch between job and person.
- 3) Too little coaching and feedback.
- 4) Too few growth and advancement opportunities.
- 5) Feeling devalued and unrecognized.
- 6) Stress from overwork and work-life imbalance.
- 7) Loss of trust and confidence in supervisor or senior leaders.

Retaining Those You Recruit (cont'd)



Fundraisers are an ambitious group (bordering on hyper-achieving). Nothing is more frustrating for an employee than discovering he or she is out of runway (reason four above). In today's environment it is incumbent upon the senior leadership team in larger advancement/development organizations to have a process that reviews all employees in the organization and their opportunities for growth. Branham advises organizations to provide easily accessible information on career paths and competency requirements that spell out how employees can progress.

Also, providing continuous coaching and feedback is an obligation that managers must take on with gusto to address reason number three. Let's be clear: feedback is about performance or the "how am I doing?", and coaching is about "where am I going?". The latter question is related to growth and learning.

Reasons five and six above point toward environment and culture. Fundraising in larger, complex institutions can be stressful and thankless work. The demands to raise more money are never-ending, and while the donors are thanked for their generosity, fundraisers are frequently overlooked. Creating an environment of appreciation, recognition, and gratitude - not only for donors, but also for the fundraisers who work with them - goes a very long way on the path of retention. A culture of appreciation helps folks feel good about the work they are doing, but it does not address stress and the work/life imbalance that often accompanies the fundraising profession. Dealing with this factor is among the top reasons advancement/development leaders work with an external professional coach. Another way leaders can reduce stress and overwhelm on their teams is to commit to a culture of play, improvisation, and laughter. In honoring this commitment, individuals look to maximize energy (not manage time), while getting sufficient rest and renewal.

Finally, at the most basic level, fundraisers want to know that they can be successful in their roles and they want to work with leadership that has integrity, and is trustworthy. All too often there is confusion, competing priorities, lack of vision, and poor alignment and communication. That is a ready-made formula for turnover. In this regard, Branham recommends (and I echo) that leaders inspire confidence with a clear vision, a workable plan, and a belief in employees' competence to achieve it.

[CLICK HERE to for the *Coaching Essentials for Nonprofit Leaders Workshop* which strengthens the coaching skills of leaders and managers on your team.](#)

How to Run a Weekly Staff Meeting that Doesn't Suck

You know the one: boring, sleepy, and life draining! The one where the team leader does all the preparation, runs the meeting, and walks out with all the monkeys on his or her back. Sound familiar? Not anymore! Want your weekly staff meeting to go from sucky to snappy? Here's how:



1) Review Action Items and Commitments from Previous Week

- No judgement. Did you do what you said you would do. If so, what result? If not, why not?
- Builds trust, commitment, accountability, and transparency for everyone.

2) Lightning Round (create an agenda on the fly)

- Go around the table. Everyone declares his or her top three or four priorities for the upcoming week. (These are the “big rocks”, not every little meeting or calendar item).
- Each individual can add agenda items on the white board for group discussion – or even better when an admin serves as scribe on the whiteboard.
- The group then prioritizes by first the urgent and important items, then the important ones that are not urgent, and finally the urgent items that are unimportant. Make sure you get to the meat first and not be at the mercy of the urgent.

3) Potential Ad Hoc Topics

- Every now and then an agenda item comes up in the weekly staff meeting that is so big it requires a separate ad hoc meeting. That ad hoc meeting could be a 1:1, involve several (but not all) members of the team, or may require other folks to be present.
- Do not bog down the staff meeting with a topic so large it may require a separate meeting.
- The scribe takes an action to schedule the meeting with the necessary individuals after the staff meeting. It could take place that very same day, or be scheduled for later in the week.

4) Decisions and Actions

- Scribe reads out all significant action items and commitments (who does what by when) and any important decisions taken.
- Scribe circulates decisions, actions, and commitments to all staff immediately after the meeting. This becomes the first order of business for next week's meeting (see #1 above).

5) Cascading Messages

- If there is anyone in the staff meeting that has people reporting to him or her, and there were decisions taken that affect those folks, it is very important that information is passed along to those folks by their manager.
- "Manager X you're going to let your team know that....." Can be added to Actions above.

As an added bonus, rotate who runs this meeting each week. By doing so, you offer opportunity for professional development and strengthen the leadership capacity of your team.

Failure, Excellence, and Perfection

Perhaps you missed a deadline, did not hit the mandated number of donor visits this month, or a donor you've been cultivating for some time said "no, not now" to the proposal you were counting on to achieve your fundraising goal for the year.



In dysfunctional teams, such "failure" is often met with criticism, shame, blame, and semi-public humiliation. The implication is: "you're (I'm) a failure". In high-functioning teams, errors like these are met with compassion, growth, and learning. The reaction is: "what are you (am I) learning from this?"

At this point it's important to make a distinction between excellence and perfection. Excellence is that quality of being outstanding or extremely good - whereas perfection is that quality of being free from all flaws or defects. In her excellent audio recording entitled *The Power of Vulnerability*, Brene Brown identifies perfectionism as the "20-ton shield" by which some individuals constantly strive to be flawless so as to protect themselves from criticism. However, being flawless is rarely, if ever possible. For the sports enthusiasts among you, consider Derek Jeter, the NY Yankees shortstop for 20 seasons. He is a five-time World Series champion and five-time golden glove award recipient, as well as an all-star selection in 14 of his 20 professional seasons. Derek Jeter is regarded as one of the most excellent shortstops in the history of baseball. And yet, he is not perfect. Over the course of his 20-year professional career, Jeter committed, on average, 13 errors each season.

Individuals in perfectionist cultures are driven by the need to always be right. There is an implicit or explicit goal of not making any mistakes. Cultures of excellence, on the other hand, are driven by curiosity. Individuals here focus on always doing their best (and they forget the rest). They know that their best can vary from day to day, month to month, and even year to year. After all, a junior fundraiser's best is likely not to be as good as that of the veteran fundraiser who has more experience.

As fundraisers it is also important to keep in mind that many of the leaders in our profession became excellent in their craft or trade on the job; they learned by doing. They went out on donor visits and had conversations. They saw what worked, and even more importantly, they saw what did not work. While it's tempting to believe that somehow we can codify all this knowledge into some compendium that can be read and applied, I believe that's a fool's errand. A better course of action is to provide a little structure, and allow those in our charge to, as Teddy Roosevelt said, "fail while daring greatly."

Failure, Excellence, and Perfection (cont'd)

Arguably, the following section of Teddy Roosevelt's "Man in the Arena" speech delivered 23-April-1910 at the Sorbonne in Paris is the fundraiser's anthem:

"It is not the critic who counts; not the man who points out how the strong man stumbles, or where the doer of deeds could have done them better. The credit belongs to the man who is actually in the arena, whose face is marred by dust and sweat and blood; who strives valiantly; who errs, who comes short again and again, because there is no effort without error and shortcoming; but who does actually strive to do the deeds; who knows great enthusiasms, the great devotions;



who spends himself in a worthy cause; who at the best knows in the end the triumph of high achievement, and who at the worst, if he fails, at least fails while daring greatly, so that his place shall never be with those cold and timid souls who neither know victory nor defeat."

In the course of human events, individuals sometimes make mistakes, even professionals who are at the apex of their careers. More often than not, these errors are a consequence of acts of commission derived from good intentions. Certainly, it is helpful to point out errors, explain their impact, and ask that the same error be avoided in the future. In addition, it may be helpful to recall what Alexander Pope, the eighteenth-century English poet, wrote on this subject in his *Essay on Criticism*: "To err is human; to forgive divine."

I encourage you to ask yourself the following question: "What kind of culture am I encouraging - one where F-Bombs are met with celebration or a bar of soap?"

Unleashing Abundance



Lynne Twist in her book, *Soul of Money*, describes three toxic myths (or, widely held, yet false beliefs) that pervade our society and drive scarcity culture. These myths are:

- 1) There's not enough.
- 2) More is better.
- 3) That's just the way it is.

The three toxic myths (especially around the subjects of money and time) are particularly destructive in fundraising cultures. From my coaching work with fundraising leaders, I can assure you that scarcity consciousness is alive and well in the very groups of individuals whose purpose is to embody abundance.

My own heretical view is that money is an expression of appreciation. When we earn it, someone else is expressing appreciation for our service. When we spend it, we are expressing appreciation for the product or service we receive. When we save or invest it, we say that our money "appreciates" (i.e., those who use it pay us interest or dividends).

In fundraising, I recognize that donors may have multiple motives for giving. I will assert here that the fundamental reason that donors give is because of the appreciation that they have for the organization they care about. Incidentally, they also give because they appreciate the relationship that they have with their fundraiser.

Now that I have totally activated all of your negative saboteurs around money (these are the voices that are saying: "he's crazy," "that's not it," and "it's way more complicated than that"); I ask you to conduct the following exercise. For one week, or just one day, notice precisely how you spend your money. Every dollar and cent. Keep a record. Then sit back and notice what you appreciate.

In the meanwhile, I encourage you to play a little game called "Money Madness," outlined by Julia Cameron in her book *The Artists Way*. Quickly (don't think), fill in the blanks on the right and then reflect on your beliefs around money.

[CLICK HERE to learn more about the Abundant Fundraising Workshop focused on shifting the fundraising team from scarcity to abundance.](#)

I'd have more money if _____
My father thought money was _____
My mother thought money was _____
If I had more money, I'd _____
If I could afford it, I'd _____
Money is _____
Money makes _____
Having money is not _____
To have more money I need to _____
When I have money I usually _____
People think money is _____
If I weren't so cheap, I'd _____

Freedom to Hope and Dream Big

As fundraising leaders there is a temptation to become complacent, play it safe, and strive to hit our numbers each year. Understandable. We have families to support, bills to pay, and lifestyles to maintain. I will assert that no institution (or individual) was ever transformed from that perspective. Some donors want to fulfill their dreams of helping organizations they care about through their philanthropy, including the deployment of their time, talent, and treasure. One of the great privileges of the fundraising profession is that we are in the rare position of helping donors dream big, while sharing their joy when those dreams come true.



That said, many of my coaching clients know that while I encourage them to dream big, I am also fond of the expression: "We're not smokin' hopium here." While I often use it as a reality check, I am for the most part quite an optimistic and hopeful person. It was in this context that I was recently reminded by a colleague of the heartfelt final scene of 1994 film *Shawshank Redemption* in which Red, after having been released from prison, is on his way to see his friend Andy in Zihuatanejo, Mexico.

Red had chastised Andy earlier in the film for being hopeful about an eventual release indicating that: "Hope is a dangerous thing. Hope can drive a man insane."

As he rides the bus southward, Red now reflects to himself:

"I find I'm so excited, I can barely sit still or hold a thought in my head. I think it's the excitement only a free man can feel, a free man at the start of a long journey whose conclusion is uncertain. I hope I can make it across the border. I hope to see my friend and shake his hand. I hope the Pacific is as blue as it has been in my dream. I hope."

What little I know about life is that it's a journey with lots of uncertainty. Every day, I share Red's excitement and anticipation. Leading (and helping others lead) a fulfilled life where we pursue our dreams is a radical act.


[**REGISTER NOW** to join a small group of exquisite professionals who are committed to fulfillment in their personal and professional lives at the *Advancement Development Leadership Weekend*.](#)

Activate your freedom and creativity to dream big!

Contact David



CALL or EMAIL me to explore leadership coaching, or to discuss any of the webinars, workshops, tribes, or retreats mentioned in this eBook.

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