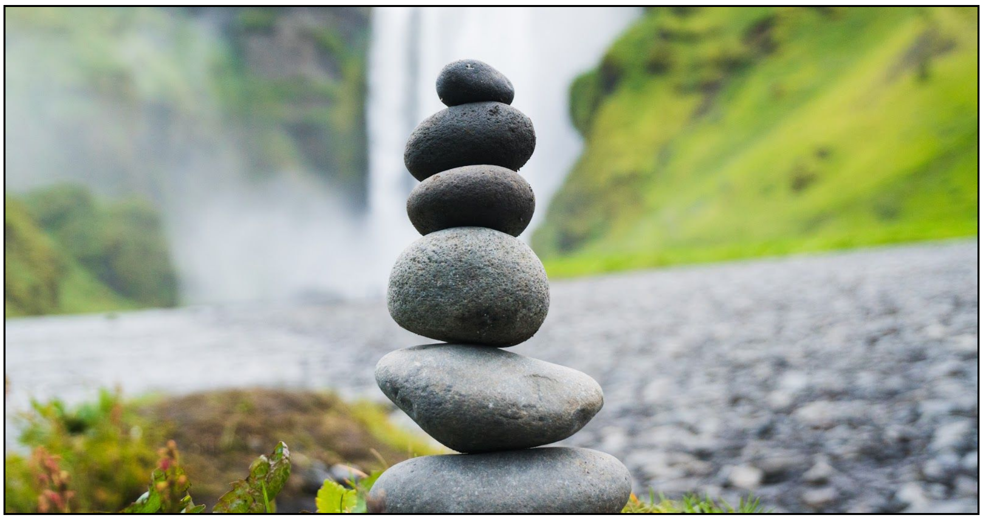
Managing for Retention

A Step-by-Step Guide for Nonprofit Leaders



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Introduction

In the marketplace for nonprofit leadership talent, demand currently outstrips supply. There are currently thousands of job postings for Advancement and Development professionals listed at the Association of Fundraising Professionals (AFP), The Chronicle of Philanthropy, The Council for Advancement and Support of Education (CASE), and LinkedIn.

In the face of this demand, advancement and development leaders often say that one of the most significant challenges they face is retaining talent. While the economic forces of supply and demand are putting upward pressure on salaries, a common misconception about retention is that it's "all about the money." That's a management and leadership cop-out, and the situation is dire. According to a recent Association of Fundraising Professionals' (AFP) report, half (50%) of fundraisers surveyed reported that they intend to leave their jobs in the next 2 years.

That's astounding! Imagine losing half your staff over the next 2 years.

Development and Advancement leaders with whom we work know that retaining their fundraisers is especially critical because of the intimate connections that they have with donors. When fundraisers leave their jobs, those relationships are impacted and fundraising results can suffer.

There are definite and tangible actions managers and leaders can take to head off this disaster. The first is to recognize that most (if not all) employees are not straight about WHY they leave. There are many reasons for this, not the least of which is wanting good recommendations and referrals for future employers.

Thankfully, we have the work of Leigh Branham, a career transition coach and author of *The 7 Hidden Reasons Employees Leave: How to Recognize the Subtle Signs and Act Before It's Too Late*. In an effort to authoritatively document the root causes of employee disengagement and voluntary turnover, Branham contacted the Saratoga Institute in California, considered by many to be the world leader in third-party exit interviewing and employee commitment surveying. The Saratoga Institute had a database of 19,700 exit and current employee surveys it had conducted for organizations in 17 different industries. Branham analyzed the data and verbatim comments from these surveys. It was this research that led to the publication of the book.

The research Branham conducted indicated that the "reasons" for departure are hidden from the very people who most need to see them clearly—the managers charged with engaging and keeping valued employees. The data showed that while 90 percent of managers believe that most employees are "pulled" away by better pay, 90 percent of voluntary turnovers are caused by something besides money. This astounding disconnect between belief and reality allows managers to deny responsibility for correcting and preventing the root causes of employee disengagement and departure.

Branham found that among seven reasons employees depart voluntarily, five of them can be influenced by management and leadership:

- There is too little coaching and feedback.
- There are too few growth and advancement opportunities.
- Workers feel devalued and unrecognized.
- Workers suffer from stress due to overwork and work-life imbalance.
- There is a loss of trust and confidence in senior leaders.

The other two reasons (the job or workplace was not as expected, and there is a mismatch between job and person) are related to the recruitment process which is the topic of another post.

Fundraisers are an ambitious group (bordering on hyper-achieving). Nothing is more frustrating for an ambitious fundraiser than discovering they are out of personal or career growth runway. In today's nonprofit environment, it is incumbent upon the senior leaders of nonprofit teams to have a process that reviews all employees in the organization for development opportunities.

It's also important to keep in mind that fundraising 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 fundraisers 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.

Also, on fundraising teams, it's not uncommon for managers and leaders to overlook those with whom they work each and every day. As the saying goes: "familiarity breeds complacency!" This is especially true in the nonprofit world where financial rewards for results are limited and work can be overwhelming. Managers and leaders can learn to coach, acknowledge, and challenge their teams in a way that is safe, and yet not comfortable.

Leaders CAN reduce stress and overwhelm in their organizations when they 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. 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, the team at www.FundraisingLeadership.org created an online training program for fundraising leaders and managers where they learn and practice essential skills for retaining employees such as:

- Consciously designing alliances with their staff.
- Practicing three essential coaching skills that improve relationships.
- Creating a culture of accountability without judgment.
- Ending gossip by fostering a culture of integrity and candor.
- Encouraging vulnerability while dealing with difficult emotions.
- Acknowledging staff for who they are (and what they do) while also providing feedback.
- Challenging their teams to go beyond what they may think is possible.
- Strengthening the ability to engage in healthy debates that builds trust and commitment while getting results.

According to Branham, what every employer needs to know is that **95 percent of voluntary turnover is avoidable**.

While the employees share much of the responsibility for staying engaged, most of the levers that increase employee engagement lie within the power of the direct manager or senior leaders to control. Too many nonprofit organizations ignore this reality or rely on pay, benefits, or other perks even though the research shows that the most powerful solutions for retaining employees involve the more challenging intangibles, such as good management and leadership.

Chapter One: Designing Alliances with Your Team

Recently, a couple of nonprofit leaders we know asked us how they might advise newly forming groups that were embarking upon important work in their organizations. Our suggestion was to urge the individuals in the groups to be intentional about how they want to engage with each other during their time together. In coaching (and leadership) we call this "Designing The Alliance" and it can look something like this:

-Show up on-time. Start promptly. End on-time.

-Confidentiality. What's said in the room stays in the room, unless otherwise agreed to.

-Commit to meetings and let everyone in the group know in advance of the rare occasions when you are NOT going to be present.

-Complete any and all agreed to tasks and work before the meeting.

-Come prepared to share and contribute to the discussion.

-Have opinions and offer feedback.

-Don't take anything anyone says personally, and do not make any assumptions.

-If you make a mess or mistake (and you will), clean it up.

-Withhold judgment. Don't make anyone wrong. Apologize if you do.

-When you have an impulse, acknowledge individuals for who they are and what they've done.

Groups that adhere to ground rules like these experience extraordinary results. We encourage you to implement the process of intentionally Designing The Alliance the very next time you organize a team, group, or committee to accomplish important work. And, if you want to learn how to run an effective and efficient staff meeting, grab a copy of *The Essential Leadership Guide for Nonprofit Professionals.*

Chapter Two: Three Essential Coaching Skills for a Leader

Listening at the speed of sound;

More curious than an inquisitive cat;

Able to access and express intuition in a single blurt.

It's Superleader. Disguised as a mild-mannered nonprofit professional, Superleader is endowed with extraordinary qualities and fights a never-ending battle for mission, impact, and results.

(Sound familiar? You can view the original classic video here.)

Leaders who listen, are curious, and use their intuition are superheroes. With other qualities, they are able to increase morale, effectiveness, and retention of staff, board members and donors. And, these three superpowers can be learned and practiced so that they strengthen over time.

Listening

You already have some good listening skills. It's an overlooked superpower. Perhaps you started as a frontline fundraiser, or perhaps you have had to engage donors somewhere along your professional trajectory. Either way, you can enhance this skill by distinguishing and noticing three different levels of listening.

Level 1: Internal Listening

When you listen at level 1, you listen to the sound of your inner voice. You may hear the words of another person with which you are engaging, however, you are primarily aware of your own opinions, stories, judgments as well as your own feelings, needs, and thoughts. This is primarily a place of listening to respond.

Most of us spend the majority of time listening at Level 1 — which is perfectly normal. It's actually important for us to pay attention to our own needs and opinions. For example, when the contractor is asking you how you want your kitchen remodeled; that's a situation that is 100% about what you want; your opinions, judgments, and desires.

Level 2: Focused Listening

At Level 2 your focus shifts towards the other person with whom you are engaged in dialogue. You pay attention to the other person's words, body language, emotions, etc. If your job involves meeting with donors or volunteers, then you likely experienced the feeling of Level 2 listening during those interactions. One key to mastering this skill is to turn off technology when you are with other people.

Level 3: Global Listening

At Level 3, your focus softens to take in everything. You become aware of the energy between you and others. You also notice how energy shifts. You can detect sadness, lightness, humor, and agitation. You are aware of what is going on in the environment. There is a way that you are conscious of the underlying mood, or tone, or the impact of the conversation. This is also the level where your intuition lives.

Superleaders learn to listen at all three levels – simultaneously. While listening to their own internal voice (level 1), they amp up their level 2 and 3 superpowers to create a connection with people, and sense what would be useful in a given situation. They also remain curious – about everything and everyone.

Curiosity

Many of us recall what it was like to be a young child and curious about everything. We used to ask simple questions like: What is that? How do we do that? (If you are a parent, this likely sounds familiar).

It is this "childlike" quality that Superleaders use to bring energy and aliveness to interactions they have with other people. It's a superpower that opens doors of possibility and has been referred to by others as "the greatest leadership trait of all." And, the key to unlocking this superpower in conversation is using "powerful questions." Powerful questions:

- Are open-ended.
- Usually start with "What" or "How."
- Should be short and simple.
- Open up a wider range of possibilities.
- Lead to new insights.
- Invite people to look within or to the future.

So, how do you kickstart your own curiosity? The best way to start is to be honest with yourself, and consider when was the last time you were really curious about the world and those with whom you interact? One simple and challenging exercise to increase your curiosity is to practice using more open-ended questions in your interactions with others. Do your best to provide little advice and very few answers. Start noticing what happens.

The power of curiosity is that it elevates your listening from level 1 to levels 2 and 3. So when someone behaves in a way that upsets you (level 1 listening), get curious. You can ask yourself: I wonder what brought on this episode? What's happening for them? And then, use your intuition.

Intuition

In addition to the customary five senses that help inform us about our environment, there is a sixth sense – intuition. It's a superpower that each of us has, although Superleaders develop and use this power regularly. It becomes active at Level 3 listening.

Many people feel intuition in their bodies. Sometimes it is literally a "gut" reaction. Some people don't feel intuition in their bodies at all — they simply have a sense, see an image, or have a thought. One way to strengthen this superpower is to practice taking immediate action on an intuitive "hit" and see what happens.

Another practice is to speak (or, "blurt") your intuition. Put words to the signal (or nudge) that you receive and say those words out loud. Unfortunately, many of us hold back our intuition because it does not align with rational/analytical ways of knowing. Therefore, by the time many of us go off to college, the sharpness of our intuitive sword has become dulled by the grind of the industrial education complex. Superleaders recognize this, and as they mature, they re-sharpen the blade of their intuitive super sword in order to cut through the confusion of our complex world. They also tune their intuitive antennas and become confident that the signals they receive are worth paying attention to. They know that the signal usually is not misleading, even though the interpretation of the signal may be off-target. Superleaders trust themselves to speak from their intuition and not be attached to the interpretation.

In our executive coaching work with highly rational/analytical clients, we encourage them to rediscover and deploy this superpower. One resource we use is Penney Pierce's *Intuitive Way*.

Being a nonprofit Superleader in these turbulent times is NOT about having a megalomaniac ego-trip. It IS about having a call to service. We need you more than ever. So, if you want to have a greater impact with your team (and donors), we invite you to activate your superpowers of listening, curiosity and intuition. And, if you'd like some support with retaining your best, then we encourage you to explore our Managing to Retain Fundraisers program where the Fundraising Leadership team will bring our own superpowers in service of you and your organization.

Chapter Three: Creating a Culture of Accountability

In his 2002 business classic, The Five Dysfunctions of a Team, Patrick Lencioni describes "Avoidance of Accountability" as one of the core behaviors that teams exhibit when they are dysfunctional. In Pat's words: "In the context of teamwork…it refers specifically to the [un]willingness of team members to call their peers on performance or behaviors that might hurt the team."

Creating a culture of accountability on teams is easier said than done. Many teams (even ones where the members have excellent interpersonal relationships) avoid accountability because of the possible discomfort involved with having difficult conversations that may be emotionally charged.

The Fundraising Leadership Team created an open enrollment workshop on this topic and we've walked hundreds of nonprofit leaders through exercises to help them create a culture of accountability on their teams. In one of the exercises, we demonstrate what an accountability conversation sounds like between a nonprofit manager and employee:

Manager–Will you do X?
Employee–(Yes, No, Counter-offer). Yes. I'll do X.
Manager–When will you do it by?
Employee–By the close of business next Tuesday.
Manager–How will I know?
Employee–I'll review it with you in our 1:1 next Wed.

To establish an environment of accountability, it's important to do so without judgment or harsh criticism. That is to say, the manager does not "judge" the employee as "bad", "stupid", "lazy", etc., if they miss a deadline, choose to change course (for good reason), or fail in a task. Of course, should a pattern of missed deadlines/commitments become apparent, then it is incumbent for a manager to have a conversation around performance, and possible dismissal.

In the above example, here's what the follow-up conversation on a team with a culture of accountability might look like during the following Wednesday 1:1 meeting between the nonprofit manager and employee. Accountability is at the top of the agenda:

Manager–So, how did it go with X?
Employee–It's done (or, it's not done)
Manager–(If done) What was the result? (If not done) What happened? What do you intend to

do now?
Employee–This was the result. Or, X is no longer necessary because….. Or, I tried X and it failed, etc.
Manager–What did you learn? (always harvest the learning) What's next?

When David led teams in the corporate sector and nonprofit world, they always started the weekly staff meeting with accountability of action items from the previous week. This practice created environments of trust, transparency, and accountability. When such culture exists on a team, then it is possible for colleagues (not just the leader) to hold their teammates accountable in a similar manner. Especially when inputs are required for work, or the action to be taken affects someone else on the team

If you are interested in learning how to have crucial accountability conversations (among other things) be sure to check out the Coaching Essentials for Nonprofit Leaders course.

Chapter Four: Ending Gossip

Gossip–The practice of sharing information about people who are not present in a "casual or unconstrained conversation [that] typically involves details not confirmed as being true."

We are all familiar with it. Every organization seems to be infused with it, and many leaders in the nonprofit world with whom we work believe it's a good thing. They mistakenly believe that it helps grease the wheels of communication and that it will somehow serve as a source of valuable information that enables the organization to function smoothly.

Unfortunately, gossip accomplishes none of these. Leaders who rely on it to do so make a faulty assumption that people are unwilling or unable to be straight with one another. And, they fear that if people did express themselves candidly all havoc would break loose. Gossip, actually, is not a sign of healthy communication – it's a symptom of a larger issue. It's a sign that people in the organization are fundamentally out of integrity with each other, and that they waste time, energy, and effort spreading information about others instead of focusing on advancing the organization and its mission.

In their excellent book, The 15 Commitments of Conscious Leadership, the authors describe gossip as a corrosive force that is not helpful. One that harms the people and relationships involved and creates organizational DYSFUNCTION. They encourage leaders to commit to: "ending gossip, talking directly to people with whom they have a concern, and encouraging others to talk directly to people with whom they have an issue or concern."

Easier said than done.

Why do people gossip anyway? While scientists site many reasons that we are hard-wired for gossip, there appear to be three main motivations and potential benefits for engaging in the behavior:

1. Avoiding Conflict – People fear that direct confrontation would cause a problem, so they vent their frustrations to a third party rather than bring it directly to the person whom it concerns.
2. Accumulating Power – Receiving, possessing, and sharing gossip is a way to gain allies and power in the organization. People come to see you as a vital source of "information."

3. Influencing People and Outcomes – Conduits of gossip can influence people in the organization to validate themselves, invalidate others, and to get what they want.

The political motivations and potential benefits embedded in reasons #2 and #3 above are topics for a whole other post. For now, let us say that there are better ways to accomplish those ends other than gossiping.

Imagine for a moment what your organization would be like without gossip – without backchannel conversations, without a rumor mill. How might you feel? Would you feel empowered to lead and communicate with greater integrity, or would you feel deprived of valuable information? Would teams more readily engage in creative risk-taking and intentional problem-solving or long for complexity and mediation? Would it enhance and inspire performance or add the pressure of "not knowing"?

In our experience coaching leaders and teams, we have discovered that eclipsing gossip by facilitating vulnerability and candor, and creating space for authentic conversations based on facts (rather than rumors) has longer-term benefits: issues get resolved faster, relationships grow stronger, and the organization functions better.

In his book, The Four Agreements, Don Miguel Ruiz uses the analogy of the human mind as a computer and compares gossip to a computer virus. A computer virus is a piece of computer language written in the same language all the other codes are written in, but with harmful intent. This code is inserted into the program of your computer (your mind) when you least expect it and most of the time without your awareness. After this code has been introduced, your computer doesn't work quite right, or it doesn't function at all because the codes get so mixed up with so many conflicting messages that it stops producing good results.

Right about now you may be asking yourself: "So, I can never talk about anyone else?" The short answer is, "Of course not." So long as you are careful about your intention. If your intention is to serve those about whom you are speaking, AND you would say what you are about to say if those people were present, then, by all means, chat away. If your intention is to get attention, divert attention, make yourself right and others wrong, then don't do it! You actually decrease your power and credibility.

Ultimately, leaders who recognize the benefit of creating gossip-free cultures commit to ending gossip on their teams and within their organization. They not only become extraordinarily careful about what they say about others; they also do not listen to gossip. They encourage those bringing information to them about others to take the issue directly to that person.

In a nutshell, gossip is a destructive force that costs the organization time and energy. It's a source of dysfunction that erodes relationships. By ending gossip, you will create a healthier and more fulfilling workplace.

Chapter Five: Fostering a Culture of Candor and Integrity

Tell the truth. Don't lie. Seems so simple, so clear-cut, so obvious. However, it's not.

Research shows that 97% of people admit to outright lying. And, while lying is a problem in many organizations it's not nearly as big of a problem as withholding.

According to Jack Welch, leadership expert and former CEO of GE, "the team that sees reality the best wins." For leadership teams, seeing reality clearly requires all the team members to be candid. But in most nonprofit organizations leaders practice selective candor, or put another way, they withhold.

"Withholding" is refraining from revealing everything to all the relevant parties. Everything includes facts, thoughts (including beliefs, opinions, and judgments), feelings, and sensations. At any moment, individuals and leaders are either revealing or concealing. They are either becoming more transparent or more opaque.

Leaders who are candid and reveal (facts, thoughts, feelings, and sensations) have a free flow of abundant energy for accomplishing their vision. Leaders who conceal and withhold interrupt this free flow of energy in themselves and in their organizations.

People withhold for many reasons including: They don't want to hurt others' feelings. They don't want conflict. They say to themselves "it won't do any good to tell them anyway (because they'll never change)." or, "nobody else in this culture talks about these things directly with other people so I shouldn't either."

With candor, you care personally AND challenge directly. However, that does NOT mean you are rude. Rudeness is a form of obnoxious aggression. It also does NOT mean that you are insincere. Here's one way it might look according to Thubten Codron:

"Your grandmother invites you for a homemade dinner, but she forgot that you don't like what she serves. When she asks, "How do you like the food?" do you say, "Grandma, I don't like it," which is the truth, or do you lie and reply, "It's really good," so she isn't offended? Neither. The question she is really asking is, "I cooked this food because I love you. Are you receiving my love?" So when she asks about the food, you can reply, "Grandma, I appreciate your cooking dinner so much, and I'm very happy to spend time with you. I really care about you." That is the truth, and it makes her much happier than saying you like her food, even if it's food you do like."

Now that exchange has integrity (for the most part). It fully expresses the thoughts and feelings in service of the relationship. The "fact" that Grandma forgot that the Granddaughter does not particularly care for the type of food she prepared is irrelevant. The relationship remains "whole and complete" which is the definition of integrity. In this case, the relationship remains "workable."

In this context, we can look at integrity not so much as doing the right thing or conforming to a moral or ethical code ("do not tell a lie") but rather as facilitating the flow of positive energy and wholesome relationships.

According to Werner Erhardt, integrity for a person is a matter of the person's word, nothing more and nothing less. For a person to have integrity, the word of that person must be (as integrity is defined in the dictionary) whole, complete, unbroken, unimpaired, sound, perfect condition.

Why your word? In *The Four Agreements*, Don Miguel Ruiz shares that your word is the power that you have to create. Through the word you express your creativity. It is through the word that you manifest everything. Regardless of what language you speak, your intent manifests through the word.

You might think of your word as a force; it is the power you have to express and communicate, to think, and thereby to create the events in your life. But like a sword with two edges, your word can create or it can destroy. One edge is the misuse of the word. The other edge is the "impeccability" of the word.

When your word is impeccable it creates a culture of integrity, a culture where each person takes 100% responsibility for actions. A culture where individuals speak authentically and with candor. A culture where gossip is minimized and even eliminated. A culture where agreements are made and kept.

An agreement is anything you have said you will do or anything you have said you won't do. It exists between two or more people. When you say to a colleague, "I'll get you the report by Tuesday at 5 p.m.," you have made an agreement.

To empower and enable yourself as a leader, you will have to be rigorous in honoring your word – with yourself, with those you lead, and with those who lead you. And, when you are up to something big in the world, there will be times when agreements are broken (like, "I'm not going to be able to get the report to that colleague by Tuesday at 5pm."). At those times, it's essential to remember that as soon you know you will not or may not be keeping your word, you let those to whom you gave your word know, and clean up any mess left for yourself and others.

Chapter Six: Dealing with Difficult Emotions

In the book, the *15 Commitments of Conscious Leaders*, Commitment #3 (summarized) is: "I commit to feeling my feelings all the way through to completion. They come, and I locate them in my body, then move, breathe and vocalize them, so they release all the way." It's a topic that Conscious Leaders come back to from time-to-time because they practice emotional intelligence.

Dan Goleman brought the phrase "emotional intelligence" into the leadership lexicon with his 1995 book by the same name and through his *Harvard Business Review Article* entitled: "What Makes a Leader?" Through his research, Goleman found that highly effective leaders distinguished themselves with qualities of self-awareness and regulation, as well as motivation, empathy, and social skill.

Unfortunately, at the time, there was not much advice for those leaders who are "sensitive," and experience their own emotions (as well as those of others) very strongly. Sensitives can often ascribe a polarity (positive or negative) to feelings, and they can also experience them with varying degrees of intensity. Fortunately, science is now beginning to describe what Buddhist and Stoic philosophers knew over two millennia ago: the mind and body create emotions based on current input and past experiences. Also, the mindfulness movement is helping leaders recognize and label their feelings in the workplace while enabling others to do the same.

Which brings us to the heart of the topic of this essay – dealing with difficult, or afflictive, emotions. In the Tibetan Buddhist tradition, these are called Kleshas or mental states that cloud the mind and result in unwholesome actions. Some of these include anxiety, fear, anger, jealousy, hatred, and desire (to name a few). For many, anger (in its various strong, mild, and weak forms) is an emotion that can come up fast and if one is not mindful can lead to harmful speech or actions which are often regretted later (think of the Hulk). Thankfully, more and more leaders have established a daily practice of sitting meditation which helps them be more mindful of their feelings. In the case of anger, mindful leaders can become more skillful (although not completely skillful) at noticing when anger arises. They breathe and create, as Viktor Frankl said [paraphrase]: "a space between stimulus and response."

In the leadership context, it is helpful to acknowledge that people come to work as human beings that possess and experience a FULL RANGE of emotions. As leaders, we can take full responsibility for our own feelings, noticing them as they arise and expressing them candidly. We can also create environments of candor that allow colleagues to do the same.

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One place to start is here and now. We encourage you to reflect upon a time when you artfully handled a difficult emotion that arose around a topic at work, and also a time when you were not so skillful. And, if you want to expand your range as an emotionally intelligent leader, we invite you (and your team) to explore the Fundraising Leadership Advanced Online Course.

You WILL expand your ability and range in this domain. That's a promise.

Chapter Seven: Being Vulnerable and Generating Trust

Dr. Brené Brown is a research professor at the University of Houston Graduate College of Social Work, as well as the author of the #1 New York Times bestselling book, *Daring Greatly: How the Courage to Be Vulnerable Transforms the Way We Live, Love, Parent, and Lead*.

Brené's 2010 TEDx Houston talk, The Power of Vulnerability, is one of the top ten most viewed TED talks in the world.

According to Dr. Brown, vulnerability is basically the feeling of uncertainty, risk, and emotional exposure. Many leaders try to avoid vulnerability by making things certain and definite. Their inability to lean into the discomfort of vulnerability limits the fullness of important experiences that are fraught with uncertainty. Experiences like affinity, belonging, trust, joy, and creativity to name a few.

The difficult thing is that vulnerability is among the first things most people look for in a relationship with someone else, however, it's the last thing they are willing to reveal. In someone else they see it as courage. In themselves, they see it as weakness.

According to Brown, vulnerability in a leader is about showing up and being seen, even when you are not at your best. It's about being yourself even when you are terrified about what people might see or think. When your self-worth is attached to producing, earning, and not failing, being authentic can be challenging.

In this context, leaders who have the courage to say, "I need help" or "I own that mistake" build trust on their teams. They are not sabotaged (and they do not let their teams be sabotaged) by perfectionism.

Research is now demonstrating there's a significant difference between perfectionism and healthy striving for excellence. Perfectionism is the belief that if you do things perfectly and look perfect, you can minimize or avoid the pain of shame, blame, and judgment. Brown describes "perfectionism" as a twenty-ton shield that is used for protection, when in fact it's the thing that's really preventing others from getting close.

According to Paul Santagata, Head of Industry at Google who was involved in the tech giant's massive two-year study on team performance, the highest-performing teams have one thing in common: psychological safety. Psychological safety on a team is the belief that you won't be punished when you make a mistake. Studies show that psychological safety allows for moderate risk-taking, speaking your mind, creativity, and sticking your neck out without fear of having it cut off. Clearly these are NOT cultures of perfection.

In organizational cultures of high-trust, leaders see ALL people and circumstances as allies that are perfectly suited to help them learn the most important things for their growth and development. They don't make assumptions, and they don't take anything anyone does or says personally. Most importantly, they aim to do their best, and encourage their team mates to do the same.

According to leadership expert, Ken Blanchard, there are four key elements that leaders need to be aware of when they are looking at building or restoring trust with the people they lead. The four elements are are:

1. Ability. Are you competent? Are you able to produce results? Do you have the skills to make things happen—including knowing the organization and equipping your people with the resources and information they need to get their jobs done?

2. Believability. Do you act with integrity? Are you honest in your dealings with people? Do you follow fair processes? People want to feel that they are being treated equitably. It doesn't necessarily mean that everyone has to be treated the same way in all circumstances, but it does mean that people are being treated appropriately and justly based on their own unique circumstances. Believability is also about acting in a consistent, values-driven manner that reassures employees that they can rely on their leaders.

3. Connectivity. Do you demonstrate care and concern for other people? It means focusing on people and identifying their needs. It is supported by good communication skills. Leaders who are connected openly share information about the organization and about themselves. This allows you to be seen as more of a real person that a direct report can identify with.

4. Dependability. Do you reliably follow through on what you say you are going to do? It means being accountable for actions and being responsive to the needs of others. If you promise something, you follow through. It also requires being organized and predictable so that people can see that you have things in order and are able to follow through on your promises.

Notice that being perfect is NOT on the list.

Chapter Eight: Providing Acknowledgment and Feedback

As humans we have a universal desire to be seen and acknowledged.

And now there is clear evidence that acknowledgement improves employee retention rates. 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*, one of the top reasons someone leaves an organization is because they feel unrecognized.

This is especially true in the nonprofit world where financial rewards for results are limited and work can be overwhelming. In this realm, the demands to raise more money are never-ending, and while donors are usually thanked for their generosity, the work of the nonprofit professionals is often overlooked.

Creating an environment that recognizes professionals for the good work they do goes a long way to improving retention rates.

What is an acknowledgement? Acknowledgements are different from compliments. "I enjoyed your presentation" is a nice compliment, whereas "you have an ability to take complex information and present it in a clear and meaningful way" is an acknowledgement. It points to who a person is being rather than what they are doing. A good acknowledgement is also about the person and not about you. While it is nice that you enjoyed the presentation, the second statement has power because it shows the strengths and skills that were being displayed by the person during their presentation.

As a manager, you will find that acknowledging your team's strengths will illuminate and expand them. It will also create a more positive and motivating environment.

So how can you strengthen your acknowledgement skill?

The first tip is to simply remember that an acknowledgement is about the person receiving it. Many of us are used to speaking from our point of view when giving compliments. This is a simple concept, but can be a difficult pattern to change. So start by noticing and paying attention to your choice of words.

“What I love about you is…” [example: “What I love about you is your curiosity”]

“You are…” [example: “You are so patient”]

“What I appreciate about you is…” [example: “What I appreciate about you is your candor.”]

“I want to acknowledge…” [example: “I want to acknowledge your perseverance.”]

The second tip is to move from pointing out behaviour to celebrating your staff’s strengths and values. A valuable exercise here is to write down the names of your staff and create a list of the things you want to acknowledge about them. Then look for opportunities to do that. Reflecting on their last performance review or one-on-one meeting can point you to ideas about strengths they have and areas they want to grow.

A third tip is to pay attention to the phrasing. It is important to use words that resonant with the person and match what they value. For example, if you know they value authenticity then acknowledge when you see them being true to themselves even in difficult circumstances.

A final tip is to notice the person’s reaction to your acknowledgement. You want to ensure that the person heard you and took it in. Some people may feel uncomfortable at first, so give them space to receive your words. And remember that tip number three is crucial in this area. If you speak their language it will be easier for them to hear you.

Want to take things even further?

Practice the art of acknowledgment in a group or team setting. Using one of the statements above, you can play what is called “the appreciation game” in a meeting. The way this game is played is that one person starts by saying: “Raj, what I appreciate about you is….”. Raj then says, “thank you.” Then Raj turns to someone else in the room and says: “Karen, what I love about you is…”. Karen then says, “thank you.” The game is played until each person in the room has given and received at least one acknowledgment.

While acknowledging a colleague can be relatively easy, providing feedback can be difficult and scary, especially when it concerns something that is hurting your organization or your relationship with that person. That fear is sometimes rooted in a belief that constructive criticism will harm the relationship.

The reality is that feedback can actually strengthen a relationship, when it comes from a place of caring personally and challenging directly (a.k.a. - *Radical Candor*). Knowing that another person is going to tell it to you straight creates and builds trust. Being vulnerable and taking the risk of providing feedback shows the other person that you are invested in the relationship.

The question then becomes: how do you provide feedback in a constructive way? It takes practice. One key is making sure that feedback isn't given just once in a while, but instead is part of the ongoing maintenance of the relationship. Employees who rarely receive feedback are more easily upended by one piece of constructive feedback. Without the context or perspective that ongoing feedback provides, they might blow the comment out of proportion.

Here are a few tips for giving feedback:

- Start with heart.. "I care about you. I am hoping the result of this conversation will...."
- Remember that people are naturally creative, resourceful and whole. They are not broken. The purpose of constructive feedback is to help the other person more fully own and leverage their strengths.
- Focus on the behavior. Discuss its impact on you and/or your organization.
- Avoid storytelling or catastrophizing. Do not make up stories about why someone did what they did. Just say: “Here’s what happened, and this was the impact.”
- Finally, try this structure: “What I admire about you is____________. What I’d love to see more of is _____________.”

Chapter Nine: Challenging Your Team to go Beyond

Most people do their best to avoid risk and minimize uncertainty. It's understandable. Taking risk is scary, and it is in our nature as human beings to want to control situations for predictable outcomes.

And yet, according to research by Andy Molinsky, a Professor at Brandeis University's International Business School, what often sets successful people apart is their willingness to do things most of us fear. Even more inspiring is that when people confront what they were avoiding, they often find they are good at it and truly enjoy it.

You have an opportunity and obligation as a leader to help people confront their fears and step outside their comfort zone. Building your skills in the area of challenging and championing your team is the key to success.

Challenging

A challenge is a request that stretches people way beyond their self-imposed limits.

It includes three parts: 1) a specified action 2) conditions of satisfaction 3) a deadline.

People can respond with yes, no or counteroffer. In fact, if a challenge is powerful enough it will stop someone in their tracks. Many people will initially say no (or want to say no) to a challenge and then will step into a counteroffer. No doubt, this counteroffer will have them do something beyond what they would have done without being challenged.

For example, imagine you manage a major gift officer who has been on the job for one month. You could issue a challenge to "visit every person on your prospect list in the next two months." They may counteroffer and say they will contact their top 50 prospects and meet with a minimum of 25 people in the next two months.

Championing

Championing means standing up for someone when they doubt or question their abilities.

It is related to acknowledgement. An acknowledgment goes deeper than a compliment. A compliment focuses on what the person did while an acknowledgement focuses on who the person is. When you acknowledge someone, you are appreciating and celebrating their character and values, that is, who they ARE. An acknowledgment sounds like this – "Sue, you model authenticity in all your interactions with the team."

Championing has a forward-looking energy. When you champion you are telling a person what they are capable of. You see that they have a strength they are not aware of yet. You tell them you know they can accomplish a goal that seems out of reach.

Imagine someone on your team is going to make their first 6-figure ask. They feel excited to take this next step. And they may still feel some doubt in their abilities. They may worry about the donor's reaction to this request.

You can champion them by saying:

"I know this meeting will be amazing. You have created a strong connection with this donor. You understand their passion for our organization. And when you speak from the heart they will understand how impactful their gift could be."

The key to championing is to be authentic and to speak truthfully about the qualities that you see in them. Because when we tell someone what we see in them, we open up a wider view that allows them to see themselves in new and powerful ways.

To start practicing this skill, choose 5 people at work (direct reports, colleagues) and issue a challenge. Explain to this person, that they have three possible responses to your challenge – yes, no or counteroffer. You want to create transformation and learning for this person. If you raise the bar high enough, then the person should respond with a counteroffer.

Additionally, think of something each of your direct reports is trying to achieve. Tell them that you know they can do "it." And remember to tell them why. In other words, articulate clearly what you see in them that offers the evidence of their ability to step into this new realm.

Conclusion

You are an extraordinary producer. Efficient, effective, and on top of your game.

Now, all of a sudden you accept a promotion within your organization to lead a new team. Or, you were recruited away to lead a team in another organization.

Either way, the game has changed. Not only do you need to continue to produce results from your frontline work, you are also responsible for getting results from and through your team.

Oh, by the way. You've not had any leadership or management training. And, the role models that you've had over the years have been, how shall we say it, less than exemplary.

You are clearly in uncharted territory and feeling a bit anxious. What do you do? See a shrink and take Prozac? No! Here are a few suggestions that may help.

Assess your situation.

Have you been promoted/hired to turnaround, realign, or sustain the team?

1. *Turnaround.* In a turnaround, you take on a unit or group that is in trouble and work to get it back on track. Turnarounds involve a lot of resource-intensive construction work — there isn't much existing infrastructure and capacity for you to build on. To a significant degree, you get to start fresh, and it requires that you start making tough calls early.
2. *Realign.* Your challenge is to revitalize a unit or group that has drifted into trouble. A realignment requires that you reinvent the team.
3. *Sustain.* In a sustaining-success situation, you're responsible for preserving the vitality of a unit/group and taking it to the next level. Keep people motivated by inventing a new challenge.

Realigning a team usually means redirecting its resources by abandoning old ways of operating and developing new ones. It can also suggest changing the team's strategy, structure, skills, and even its culture. In turnarounds, you may be dealing with a group of people who are close to despair — it is your job to provide a light at the end of the tunnel. When sustaining success, you need to focus on what's working and continue to build upon that.

In assessing your situation, you may want to think of yourself as an "architect" of your unit or group. The architect role may be unfamiliar to you because few first-time managers get training in organizational design. To equip your group to achieve its goals, these five elements of organizational architecture must work together:

- Strategy: The core approach your team will use to accomplish its goals.
- Structure: How people on the team are organized and how their work is coordinated.
- Systems: The processes used to get work done.
- Skills: The capabilities of the various people on your team.
- Culture: The values, norms, and assumptions that shape team behavior.

Create a Mastermind Alliance

The 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."

As a new leader/manager, you would be well served in creating your own Mastermind Group that will support you in your new role. The first step in establishing a Mastermind Alliance is for you to adopt a clear purpose or intention for the group, 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.

A few years ago, Fundraising Leadership established a group of executives that meet regularly as a roundtable to support one another as "Conscious Leaders." Feel free to email David if you are interested in this group.

In forming such a group, it is essential to consider each candidate for membership in the light of their ability, personality, and willingness to help and cooperate with other members of the group.

Once the group is established, it is incumbent upon you to ensure that action is forwarded and learning deepened in support of fulfillment of the group's purpose. You can organize each meeting with content or questions of interest to the group purpose while keeping everyone aligned with the 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.

Accelerate Your Learning

Usually, when a new leader swerves off course, failure to learn is a factor. There is so much new information to absorb that it's difficult to know where to focus. Or, when a new manager/leader focuses too heavily on the functional side of the enterprise — metrics, donors, software, and strategies — critical learning about culture and politics is shortchanged. The fact that few managers receive training in systematically building and sustaining a high-performing team compounds the problem. Those who have had such formal training are usually better prepared.

Even in situations in which you are brought in solely to impart new ways of doing things — such as a turnaround — you still need to customize your approach by learning about the organization's culture and politics.

A good starting point is to define your learning agenda, ideally before you even formally enter the organization or the new team. A learning agenda establishes your learning priorities and consists of a focused set of questions that will guide your inquiry. As you learn more, you can make adjustments and your learning will shift as the situation evolves.

During your transition, you'll learn from various types of hard data (e.g., financial and operating reports, strategic and functional plans, employee surveys, etc.). You'll also pick up on the "soft" information about the team's strategy, capabilities, culture, and politics. The best way to obtain this intelligence is to talk to people on the team. Get to know them and the situation. Identify resources that will make your learning more complete and more efficient.

Finally, as part of your learning plan, you will need to assess yourself and determine what skills you need to develop to grow as a leader. More often than not, the organization is not going to do this for you. So, it is incumbent that you take 100% responsibility for your learning and growth.

About the Authors

Janice Cunning is an experienced fundraising consultant, researcher, and certified professional Co-Active coach (CPCC, PCC) who specializes in nonprofit leadership development. As a coach, Janice is passionate about partnering with fundraisers to help them create an inspired vision that transforms lives. In addition to her coaching work, Janice loves working with teams and facilitates a number of online courses and onsite workshops.

Janice combines her coaching skills with 17 years of experience in the nonprofit sector. She was previously a Senior Consultant at KCI, Canada's largest fundraising consulting firm. In this role, Janice provided coaching to leading university prospect research departments with a focus on strategic planning, teamwork, and communication. Within the firm, she led strategic planning retreats and monthly meetings that focused on innovation and continuous improvement to client services.

Clients appreciate how Janice helps them identify their values and make choices that align with what is most important to them. She provides a practical approach and specific tips and techniques that make them better leaders. Clients describe her as warm and caring and as someone who gently challenges them. As a coach, Janice most enjoys working with clients to:

- increase awareness about their personal values and strengths
- focus on leading rather than managing
- undertake work that has the highest impact on their organization's mission
- empower their teams through delegation and prioritization
- choose the right work/life balance that energizes them

Janice has coached or trained senior leaders and teams at nonprofit organizations across North America, including University of Toronto, Toronto Symphony Orchestra, Toronto General and Western Hospital Foundation, Soulpepper Theatre Company, YMCA of Greater Toronto, YWCA Toronto, United Way Greater Toronto, War Child Canada, Camp Oochigeas, Rutgers University, Bucknell University, George Washington University, Oklahoma State University Foundation, University of Southern California, University of Florida, Occidental College, and University of Rochester.

Janice earned a BA in History from Trent University and a Master of Library Science from the University of Toronto. In addition to her coaching certification, Janice is a certified Relationship Awareness Facilitator who administers the Strength Deployment Inventory tool to fundraising leaders and teams.

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An active volunteer, Janice was a founding director of Apra Canada and the second international member to serve on the international Apra board. Recently Janice served the coaching community as Vice President and Secretary for the International Coach Federation – Toronto Chapter. She is currently acting as a mentor for graduates of CTI's Leadership Program.

Janice lives in downtown Toronto with her husband Manish. She loves to read and talk about books, especially with her book club. Janice enjoys dance and Pilates classes and most winter weekends you will find her skating by the lake.

Contact Janice by email

David Langiulli is an experienced leader, fundraiser, trainer and certified professional Co-Active coach (CPCC, PCC) who specializes in nonprofit leadership development. As an executive coach, David helps nonprofit leaders clarify what's essential and important so they can effectively lead their teams, and achieve results for their organizations. In addition to his coaching work, David facilitates a number of online courses, onsite workshops, and retreats for leaders interested in professional as well as personal advancement, growth, and development.

David's professional background spans both the nonprofit and corporate sectors for over three decades. In the nonprofit world, 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.

Prior to launching his training and coaching practice, David led a fundraising team of ten professionals at Princeton University that was responsible for $35million in annual support for the University's mission. Before this, he 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 co-publishes the Fundraising Leadership Blog and Podcast for nonprofit professionals interested in fundraising, leadership, and management. He is also the author of *The Essential Leadership Guide for Nonprofit Professionals* and *The Stoic Way of Leadership*. His posts on LinkedIn are regularly followed by thousands of nonprofit professionals interested in self-development, leadership, and management. Some of David's philosophy and approach to working with leaders is expressed in his podcasts, blog posts, and eBooks.

Since launching Fundraising Leadership, David has coached or trained senior leaders at several organizations and institutions across North America including those at: Able Academy, ADRA International, American Institutes for Research, American University, Anglican Church of Canada, Ashinaga, Boys and Girls Club, Bucknell University, Catholic Health Services of Long Island, Camp Oochigeas, Columbia University, Cornell University, Colorado State University, Collier Child Care, Conservancy of Southwest Florida, Franklin and Marshall College, Georgetown University, Harry Chapin Foodbank, Hillside Family Agencies, Lehigh University, Naples Art Association, Naples Botanical Garden, New York University, Naples Children's and Education Foundation, Penn State, Princeton University, RIT, Rutgers University, Stanford University, San Francisco General Hospital, Sanibel Community Housing, Toronto General and

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Western Hospital Foundation, Toronto Foundation, UNICEF, United Way Toronto & York Region, University of California-San Francisco, University of Florida, University of Michigan, University of Rochester, University of Southern California, University of Wisconsin, Washington University, St. Louis, Wesleyan University, Yale University.

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.

David retired from his mountaineering avocation, after having scaled peaks across North America and Europe. He is now practicing to become proficient in the martial art of Jiu-Jitsu. Like the founding fathers of the United States of America, he values life, liberty, and the pursuit of happiness.

As a volunteer, David coaches youth classes at his Brazilian Jiu-Jitsu Academy and he serves on the Board of Directors for the Collier-Lee Chapter of the Association of Fundraising Professionals.

Email David or **Schedule time to speak with him.**

Michelle Maloy Dillon (CPCC, PCC) is an experienced entrepreneur, trainer, and certified professional Co-Active coach who specializes in leadership development. As a coach, she is passionate about helping her clients be aware of their strengths and stretching themselves as leaders to be conscious of their impact. In addition to coaching, Michelle also designs and facilitates leadership programs that challenge the conventional definition of leadership. She helps leaders create a culture of collaborative decision making that is highly adaptable to change. This enables leaders to harness the creative problem-solving techniques that are unique to them.

Michelle combines her coaching and leadership work with over twenty years experience as a professional photographer and entrepreneur where she witnessed many examples of leaders who were unaware of their impact. She has stepped out from behind the camera to grow leaders who want to be conscious of their impact and create empowered and productive teams.

Executives frequently describe Michelle as someone who helps them recognize and celebrate their strengths, increasing their leadership effectiveness in a grounded and authentic way. She is gifted at tactfully and directly pointing out areas that can be considered differently, and holding people accountable for putting the changes they choose into practice. Michelle's open curiosity and playfulness creates an environment of creativity when exploring big changes. Her work with executives results in measurable improvements in developing talent, strategic management, and team effectiveness.

Michelle has coached or trained senior leaders and teams at many nonprofit and private sector organizations including Boston Children's Hospital, Colorado Center for Nursing Excellence, Bucknell University, The University of Colorado, MIT Media Lab, Colorado State University, United Way of Carlsbad, Food Lab Detroit, Guadalupe Center, Girls Who Code, CASH Music, Amino Labs, UNICEF, Threshold Choir, U.S. Department of Labor, EPA, U.S. Forest Service, Southern California Edison, Summit Financial Group, and Alleyton Resource.

Michelle holds a PCC certification through the International Coach Federation (ICF) and a CPCC certification through the Co-Active Training Institute (CTI). She is also a CTI faculty member, teaching coaching skills that shift the leadership paradigm to one of self-authorship, self-authority, and relationship. She is also a graduate of CTI's rigorous Leadership program. Additionally, she is certified in The Leadership Circle Profile and DISC behavioral assessment and has extensive working knowledge of Myers Briggs, Emotional Intelligence and Strengths Based tools.

As a volunteer, Michelle provides coaching to United Nations humanitarian staff located around the world. She is also a leadership coach empowering young women leaders through The

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Coaching Fellowship and mentors undergraduate business majors at the University of Colorado Leeds School of Business.

She re-energizes by hiking in the mountains of Colorado where she lives with her husband, Gene and their playful dog. Her two kids are in college and she is excited to support them as they create their own lives in the world.

Email Michelle to schedule time to speak with her.

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