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Abstract: The article discusses the training required by fundraisers to handle the demands and frustration of their job. Topics include views of fundraisers on the expectations set by their management, investment for fundraiser training and appreciating the donors. Comments by Steven Rum, the Vice President for Development and Alumni Relations for the Fund for Johns Hopkins Medicine and his training program are also mentioned.

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9 Steps to Giving Fundraisers the Help They Need to Succeed

GREAT FUNDRAISERS

STEVEN RUM, the top fundraiser at Johns Hopkins Medicine, is facing enormous pressure to raise more money, and he sees his peers struggling, too. But when he looked around for help, all he found were professional training or other resources aimed at entry- and midlevel fundraisers.

And at conferences he attended, he says, people were staring at their cellphones instead of listening to the speakers, while the so-called experts leading sessions seemed more intent on drumming up business for themselves than providing useful information.

So Mr. Rum is taking matters into his own hands. He's created a three-day training program to help top fundraisers navigate the growing demands and frustrations associated with senior development jobs.

This month, more than 35 fundraising executives from hospitals and medical centers are coming to Johns Hopkins to participate in Mr. Rum's first Philanthropy Institute.

At a cost of \$3,900 each (being paid by their organizations), the fundraisers will hear from chief development officers, doctors, trustees, and others from health-care institutions that have greatly increased donations.

THE NEW TRAINING PROGRAM is a rare example of support for fundraisers grappling with the demands of jobs at the top of their profession: Many work at organizations that are scrambling to find new donors and gifts to offset dwindling revenue from government and other sources in addition to steadily rising costs.

Turnover, after slowing during the economic downturn, is again rampant in the fundraising profession, with growing numbers of experienced development officers saying they no longer aspire to the top fundraising job because of the stiff challenges of that position.

"These jobs are increasingly pressure-filled, and they have complex dynamics," says Mr. Rum. "You are dealing with multiple audiences. You have to be a leader, coach, business analyst, writer, and a psychologist with donors. You have to manage the stress and pressure."

As demands on fundraisers grow, more training programs like the Philanthropy Institute are likely to pop up. But experts say that organizations should also do more to help recruit and retain high-performing fundraisers. They say charity leaders must:

Take the long view

Many fundraisers are frustrated that chief executives, trustees, and others have unrealistic expectations that they can raise a lot of money in their first year on the job, says Colette Murray, an executive recruiter who specializes in placing development executives. "New fundraisers need more time."

Eileen Savage, the interim chief development officer at the J. Paul Getty Trust, echoes that sentiment. "Once you hire fundraisers, give them a long runway," she says. "Transformational fundraising takes a long time, and urgency is the enemy of fundraising. Organizations must demonstrate patience."

Offer good role models and flexibility

To recruit qualified fundraisers, it helps organizations if they can place one or more experienced development officers at the helm, says Kent Dove, a now-retired fundraiser at the Indiana University Foundation and author of five fundraising textbooks. Mr. Dove says that he and Curt Simic, the foundation's president emeritus, had a recruiting advantage because entry-level and midlevel development officers wanted to work with them.

"People who can see a career path and want to move up are going to be aggressive in seeking you out," he says.

Dwayne Ashley, vice president for development at Jazz at Lincoln Center, agrees: "You need an environment where people feel they can grow, make mistakes, where they feel you'll invest in them. You have to have an environment that is family-friendly: Parents cannot always come to evening events. Meet people where they are and support them."

Flexibility matters more than salary to fundraisers juggling family responsibilities with a busy career, says Patrick Feeley, chief development officer at Caron Treatment Centers, a Wernersville, Pa., organization that helps people kick substance-abuse problems.

"Fundraisers who have flexibility take more ownership and are more in control of their lives," says Mr. Feeley, chair-elect of the board at the Association of Fundraising Professionals. Fundraisers with flexibility, he adds, "are more attractive to donors, and they will be more excited about their job because it doesn't feel onerous."

Learn how fundraisers want to be rewarded

To encourage loyalty from his fundraising staff, Bobby Prince, associate vice president for development at the University of Memphis, asks colleagues how they want to be acknowledged for performing well. Whenever possible, he honors those preferences.

"Some people want to be recognized publicly, others just want a handwritten note," Mr. Prince says. "Others like monetary rewards or time off. Recognize them in ways that are meaningful to them."

He says he also asks fundraisers about their long-term career goals and looks for opportunities outside their current responsibilities, such as the chance to shadow a more experienced colleague who can help them advance professionally.

Simplify how gifts are accepted

When Jean Gorman, director of gift planning for Lucile Packard Children's Hospital, had a similar job at the University of Notre Dame, she reviewed the documentation for several charitable trusts that were created to benefit the university.

"Each one was different, and I realized we needed standard forms," she recalls. "That was a godsend. Know where fundraisers need to go to get the information they need to close gifts, and streamline those steps."

Invest in fundraisers' continuing education

Some organizations fear that training fundraisers to help them advance in their career will prompt them to leave for a better job elsewhere, but that fear is misguided, says Ms. Murray, the recruiter.

"You need constant education because the field has changed," she says. "You really have to make an investment in people, and you are better off with fewer but better educated fundraisers." Donors, she adds, see a big difference between professional and untrained fundraisers.

What's more, Ms. Murray says, the cost of membership in organizations such as the Association of Fundraising Professionals or the Partnership for Philanthropic Planning, which provide training and other resources, is relatively modest. Most types of memberships available from those organizations cost a couple hundred dollars or less.

Provide fundraising training to others

Many charities expect their lead fundraiser to educate other senior staff and board members about how they can help attract donations, but that usually doesn't work, says Ms. Savage of the Getty Trust. "Do some internal training; the fundraiser cannot do this alone," she says. "Many fundraisers worry about managing up, so take that off their plate if you can."

She urges chief executives to require the staff to participate in such training. Otherwise, they will find ways to avoid participating.

Build fundraisers' ties to other departments

When Ms. Gorman was seeking bequests and other planned gifts for Notre Dame, she says that one of the most important things she did was to befriend the university's general counsel and other executives in its investment and finance departments.

"We could not do what we needed to do without really good relationships with these folks," she says.

Among the ways the general counsel helped: She persuaded the Internal Revenue Service to allow the university to mingle funds in 17 charitable remainder trusts with its endowment, which was managed by a financial expert whom donors held in high regard. The number of charitable trusts grew to about 100 in a single year, Ms. Gorman recalls.

She also turned to the general counsel for quick answers to donors' year-end questions such as whether a couple could set up a charitable trust by providing \$50,000 one year and another \$50,000 the next to meet the \$100,000 minimum required for such a gift.

"She took my call and had a response within an hour," recalls Ms. Gorman. "It was Christmas Eve."

Set and share organizationwide goals

Bennie Harris, senior vice president for institutional advancement at Morehouse School of Medicine, says that he struggled in a previous job to attract gifts of \$100,000 or more because his organization failed to articulate why it needed the money or how such big gifts would be used.

"There was a lack of clarity," he recalls. "When you don't know what you are raising money for, it is hard to move beyond the annual gift. When you hire major-gift officers to work with donors able to give six figures or more, they need to be able to talk about how it will transform the institution."

Mr. Feeley of Caron Treatment Centers says that the amount of time his organization spent educating him about addiction and the treatment industry when he was newly hired was "invaluable." Charity leaders, he says, "must take very seriously how they engage the fundraiser to really understand the organization, to feel it. What is their plan for educating the fundraiser? That is the key to success."

Resist cutting back-office functions

Fundraisers say that they are under constant pressure from trustees and executives who don't understand fundraising to cut the cost of raising a dollar. Often that means giving short shrift to back-office duties like gift processing and building relations with donors through personal contacts that don't involve a solicitation, says Mr. Ashley, of Jazz at Lincoln Center.

"Invest in the resources you need to do stewardship," he says. "This is how you keep people engaged and get them to re-up."

After securing a large gift or pledge, Mr. Ashley says, he shoots for four to six solicitation-free contacts between his organization and each one of his donors every year.

Fundraisers, says Mr. Feeley, "need to be out on the road, and they have to have the support of information technology and human resources. They shouldn't have to struggle with systems."

He says he is fortunate to work for an organization that takes administrative support for fundraisers seriously.

"The back-office staff here is treated with respect," he says. "They are equals."

But "a lot of institutions have a problem appreciating what the back office does," says Mr. Harris. "You need to think about details. It is very hard to get a million-dollar donor back if they don't feel appreciated."

Finding Fundraising Talent in Unexpected Places**LAWYERS**

They're smart, and they're accustomed to asking questions.

ATHLETES

When in training, they work hard toward a goal and are usually self-starters.

JOURNALISTS AND PSYCHOLOGISTS

People who are trained to listen can help uncover donors' wishes.

LEADERS

Even heading up a school club can give leadership experience that's useful in organizing fundraising efforts.

FUNDRAISERS UNDER PRESSURE

48% say they have look for another job in the past 12 months

Top reasons for considering another job

- 42% to earn more money
- 36% for more responsibility and authority
- 30% frustration with current work environment

SOURCE: Association of Fundraising Professionals

FAILURE FUELS TURNOVER

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By Holly Hall

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