## MOVING FROM SURVIVAL TO THRIVAL

Kimberley MacKenzie, CFRE - @KimberleyCanada



Thursday, October 18, 2018

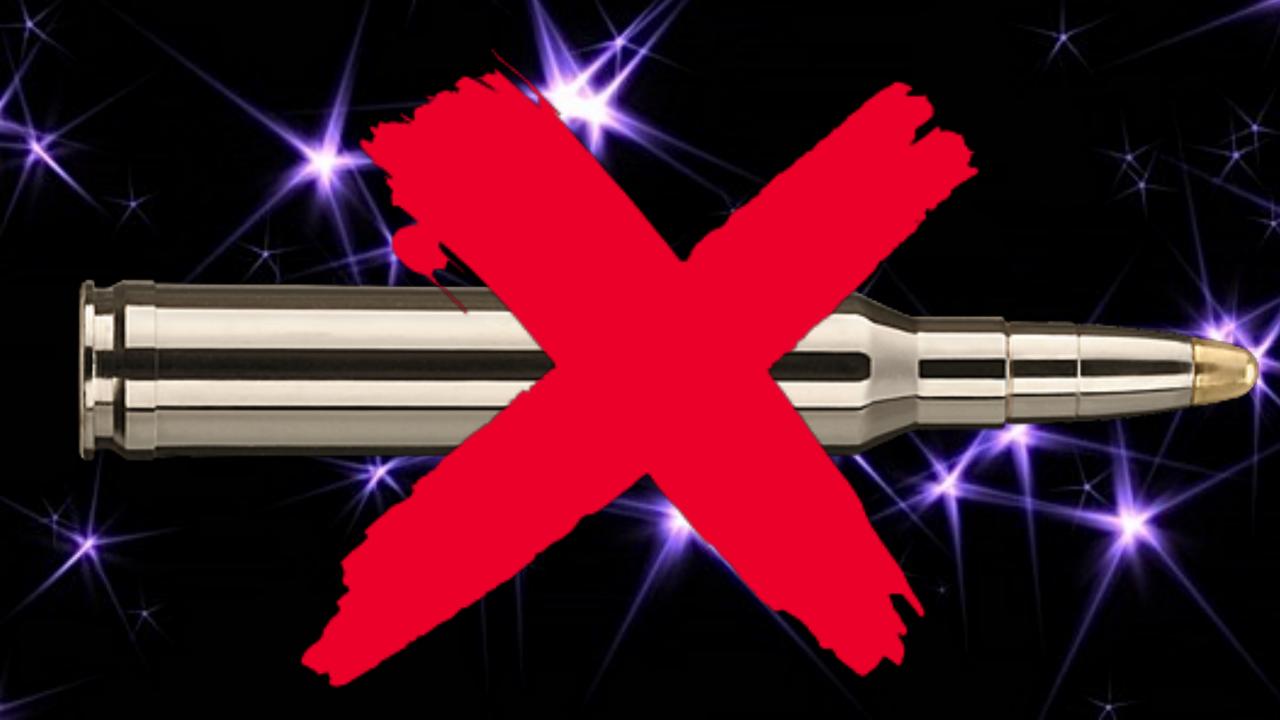
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Special thanks to my friend Rickesh Lakhani who partnered in the development of the original thinking and session.









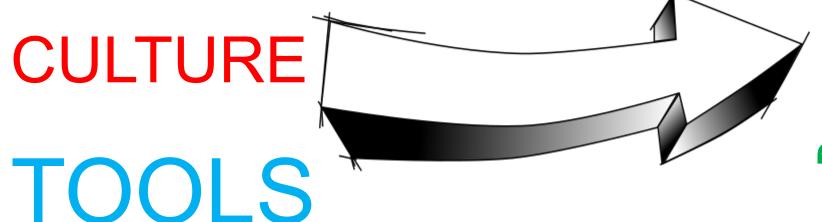




#### **FRAMEWORKS**

### **LEADERSHIP**





"THRIVAL"

PRIORITIES



# WHAT GIVES YOU SPARK, ENERGY, LIFE?

WHAT IS FEEDING YOUR SPIRIT?

# thrive //Thriv/

1. To prosper; be fortunate or successful.

2. To grow or develop vigorously; flourish.



### WHAT DOES THRIVAL LOOK LIKE?



## 

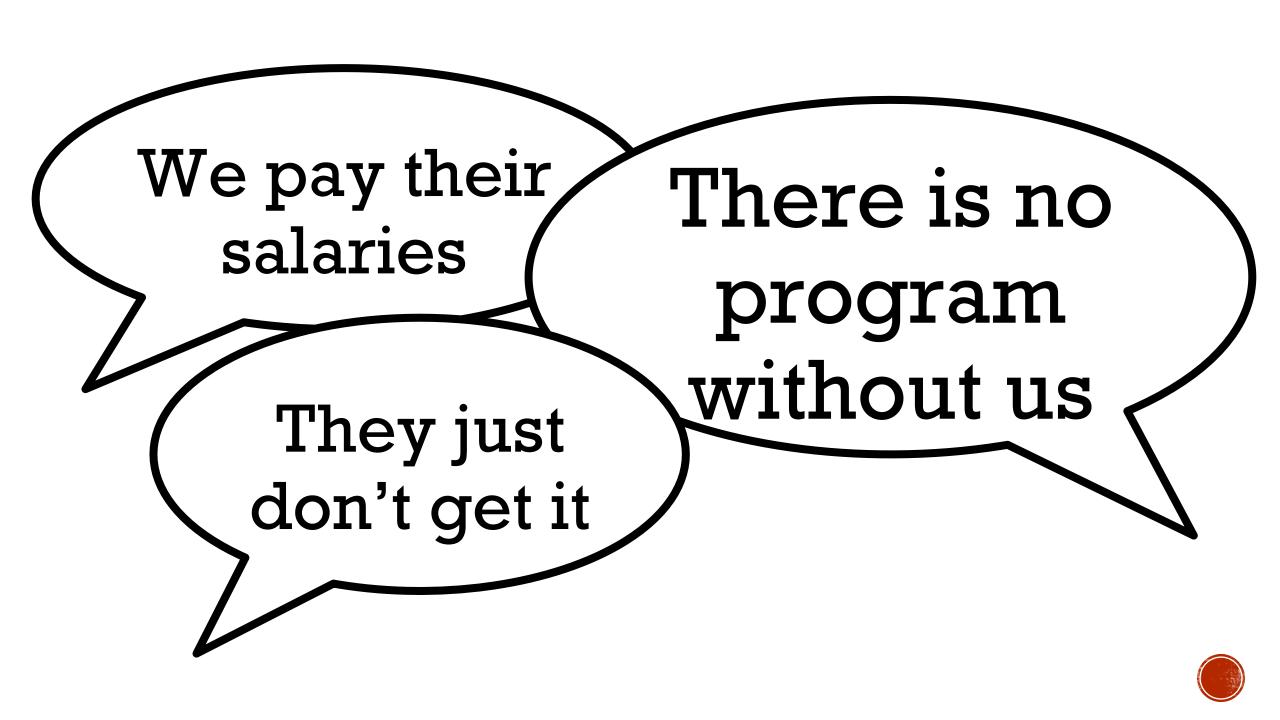
1. Not actually a word.



With more resources, we could do better

I want my boss to support my work

We can raise more money if we make some changes



### WHAT YOU SAID

I can connect dreams, money & make magic

I sing at work
when we find the
perfect project
that gets a donor
excited

# FUNDRAISERS LOVE MAKING A DIFFERENCE AND MAKING DONORS HAPPY







### THE FUNDRAISER'S REALITY

- Compensation is not the primary driver
- Fundraisers are trying to build relationships internally
- Every environment is different but common themes emerged



#### 3 PILLARS FOR A THRIVING ORGANIZATION

Culture



Leadership











27%

said your peers actually understand your job







92%

said a fundraiser's role in influencing a philanthropic culture is critical



# Half of you

have a nemesis at work







Half of
YOU
don't have a
nemesis at work



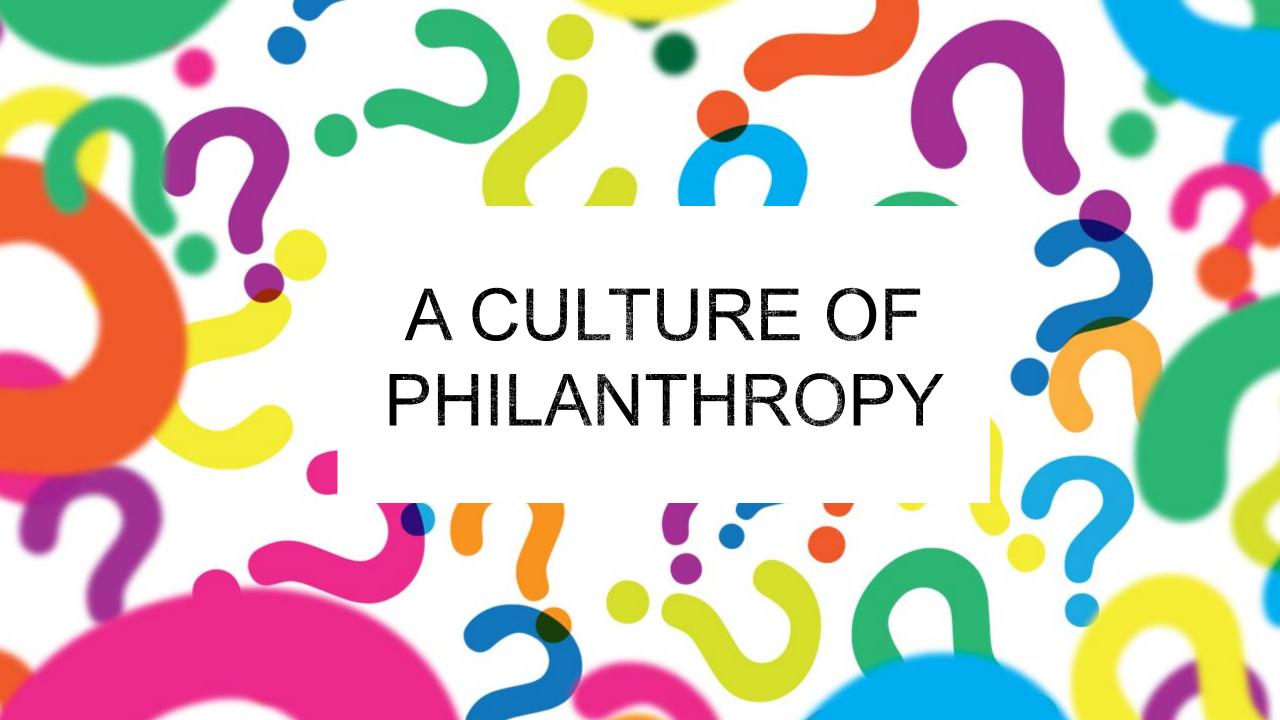
### CULTURE - WHAT THRIVAL SOUNDS LIKE

Our job as fundraisers is to support program staff in meeting their objectives – we can't do that if we don't have mutually-supportive relationships.



### CULTURE - WHAT THRIVAL SOUNDS LIKE

I admire every member of our organization. Even when faced with adversity, we rise to the challenge. We continue to produce high quality work, communicate kindly and efficiently, and tackle our challenges in a collaborative manner. Ultimately, our greatest strength lies in our ability to work as a team.



## A culture of philanthropy embraces relationship building



Engages those who share your beliefs and values



Building a community of believers



The money follows





#### CULTURE - WHAT'S THE ISSUE?



Others need to understand your job

 It requires more than workshops, memos, emails, articles and posters

Shifting a culture requires small incremental shifts over time

 Success requires that we be sincerely curious about the people around us



HOW CAN WE
INFLUENCE
OTHERS
TOWARDS A
CULTURE OF
PHILANTHROPY?



### THE FOUR LEVELS OF INFLUENCE

I will change my mindset and behaviour if there is/are...

Source: Scott Keller & Colin Price (2011) www.managementexchange.c ROLE MODELLING

COMPELLING STORY

SKILLS REQUIRED TO CHANGE

REINFORCEMENT MECHANISMS

### COMPELLING STORY

- Determine your influencers to find your champions – who do people listen to?
- Find out what that person thinks about fundraising and building relationships with donors?
- Ask their advice

Seek understanding



### COMPELLING STORY

- Be curious about their assumptions & experience – why did they join your cause?
- Explain your vision

### Seek understanding



#### REINFORCEMENT MECHANISMS

 Ask them to be able to take a donation on the phone – give them a pledge form to have in their desk

Thank you calls are fun to make

 Ask them about their work so that you can tell donors

Create structure and clear processes



#### REINFORCEMENT MECHANISMS

Ask staff to sign cards for donors

 If you get letters from donors – put them up for all to see

 Make a presentation about their work at an event

Create structure and clear processes

 Menu of ways in which to engage in philanthropy



### SKILLS REQUIRED TO CHANGE

 Support others in talking in a way that helps engage people in your cause

Teach and provide skills

 Give program staff language to speak about your organization to convey that you need support to operate



### SKILLS REQUIRED TO CHANGE

 For making thank you calls, provide a script and process

 Take program staff with you on donor visits

Teach and provide skills



#### ROLE MODELLING

Steward internal audiences

 Give public accolades to those who did well

Reinforce with your actions

 Report back with donor comments and feedback



#### ROLE MODELLING

 Model the kind of behavior you want to see

 Be sure to use positive, respectful language about money and donors

Reinforce with your actions



I will change my mindset and behaviour if ...

Source: Scott Keller & Colin Price (2011) www.managementexchange.c "...I SEE MY LEADERS, COLLEAGUES, AND STAFF BEHAVING DIFFERENTLY."

"...I UNDERSTAND
WHAT IS BEING
ASKED OF ME AND IT
MAKES SENSE."

"...I HAVE THE SKILLS AND OPPORTUNITIES TO BEHAVE IN THE NEW WAY."

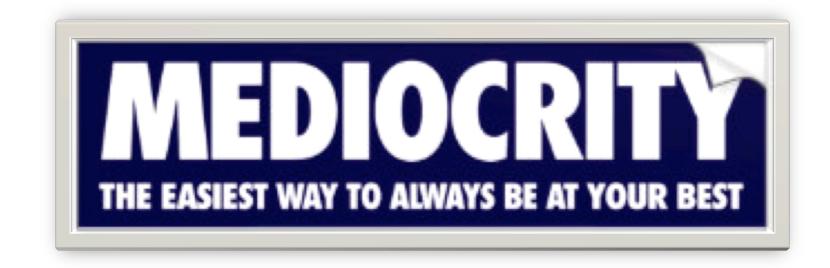
"...I SEE THAT OUR STRUCTURES AND PROCESSES, AND SYSTEMS SUPPORT THE CHANGES I AM BEING ASKED TO MAKE."

## © CULTURE – TAKE ACTION

Write down two things you would like to change about your culture you work in and two strategies to help you take action



#### PRIORITIES - WHAT WE HEARD



50%

said your organization is performing at a mediocre level



#### PRIORITIES - WHAT WE HEARD

50%

said your organization is punching above your weight





#### PRIORITIES - WHAT THRIVAL SOUNDS LIKE

It's difficult not to get distracted, especially with well-intentioned but sometimes uninformed suggestions by leadership or the Board. By defining our direction and sticking to our guns, and having a system of weighing opportunities and benefits, we focus on what is most important.

#### PRIORITIES - WHAT'S THE ISSUE?

- Determine where we can get the highest impact
- Spend more time there
- Move to a growth mindset rather than a scarcity mindset
- Focus on what can be achieved
- Get rid of everything else









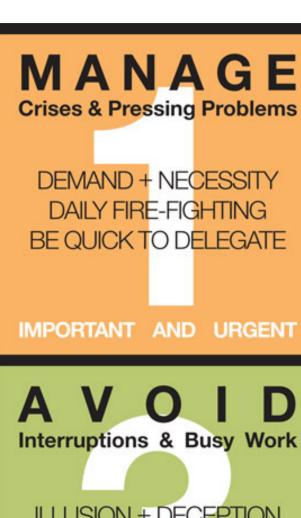
HOW CAN YOU MAKE SURE YOU ARE SPENDING TIME ON THE MOST IMPORTANT THINGS?

Important
Urgent

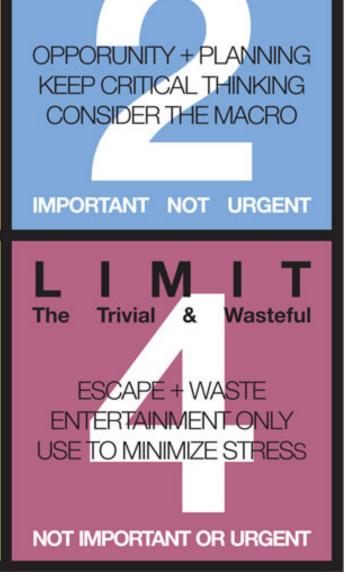
**Necessity** 

NOT
Important
Urgent
=

**Deception** 







**Strategies** 

**Values** 

Important
NOT urgent

Quality and Leadership

NOT
Important
NOT Urgent

Waste

# MANAGE Crises & Pressing Problems

DEMAND + NECESSITY
DAILY FIRE-FIGHTING
BE QUICK TO DELEGATE

IMPORTANT AND URGENT

- Corporate decision maker wants to meet
- Time-limited new opportunities
- Media opportunity has come up
- Meeting a donor about estate plans
- Unexpected challenges

- Acquisition of new donors
- Development audit & planning
- Long-term strategy
- Major donor stewardship
- Planned giving conversations



# A V O I D Interruptions & Busy Work

ILLUSION + DECEPTION NOT YOUR EMERGENCY MINIMIZE INVESTMENT

URGENT NOT IMPORTANT

 Talking to people who don't care about your cause

 Looking for your own Ice Bucket challenge

Chasing fads

Work emails

Special events which are pet projects

Timewasters

 Collecting data you don't use

Donor surveys you don't use

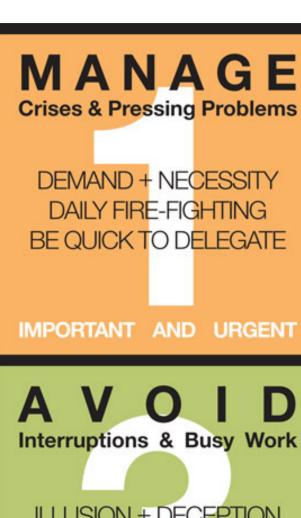


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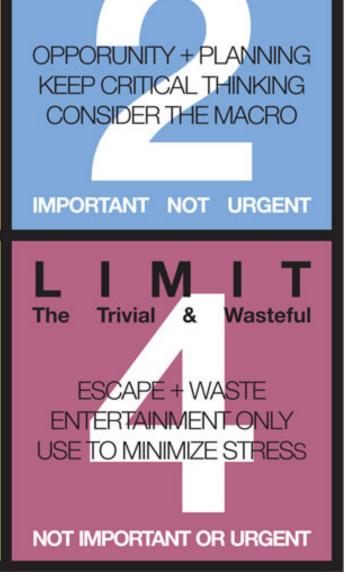
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Waste

# GUARDING YOUR PRECIOUS RESOURCES

- 4 D's
  - Do
  - Defer not right now
  - Delegate not me
  - Delete not at all



# GUARDING YOUR PRECIOUS RESOURCES

With every decision, ask how will this:

- make life easier
- increase donor satisfaction
- raise more money

What are you deciding NOT to do? Think opportunity cost.





What is the one thing you need to do to spend more time in the important/non-urgent quadrant?

What unimportant/non-urgent things do you need to STOP?

# 



#### LEADERSHIP - WHAT YOU SAID



56%

said the relationship between fundraising and leadership is weak

#### LEADERSHIP - WHAT WE HEARD

50%

said your leader was the person you admire most in your organization





#### LEADERSHIP - WHAT THRIVAL SOUNDS LIKE

lead from behind knowing that I must choose which battles I'm going to take on while slowly bringing forward my ideas and change even if it often means that they aren't positioned as my ideas. The important thing is that I'm driving change.

#### LEADERSHIP - WHAT'S THE ISSUE?

- Your Board and CEO/ED are linchpins in fundraising success
- Your duty is to keep fundraising in the mind of the top decision makers
- Success requires multiple approaches and finding leaders that are already on side







HOW DO YOU
INFLUENCE
YOUR BOSS
AND YOUR
BOSS' BOSS?



#### THE 3 APPEALS TO INFLUENCE AUTHORITY

Source: Harold Scharlatt, Forbes (2011)

This is good because it's better for our bottom line

Logical

Reason and intellect

This is good because it aligns with who we are

**Emotional** 

Goals and values

This is good because it makes our whole organization better

Cooperative

Collaboration, consultation, alliances

#### WHY INVOLVE BOARD MEMBERS IN DEVELOPMENT?

They can help us raise more money through their networks

It's important for our volunteers to be ambassadors and show they care

Successfully engaging our Board here will have positive effects on their involvement in all areas

### Logical

Reason and intellect

### **Emotional**

Goals and values

### Cooperative

Collaboration, consultation, alliances

# WHY SHOULD ALL STAFF TAKE PART IN STEWARDSHIP?

It will make donors more likely to give in the future

Our donors deserve recognition for their impact on our work

Everybody in the organization can rally behind thank you phonecalls - it will uplift them

### Logical

Reason and intellect

#### **Emotional**

Goals and values

### Cooperative

Collaboration, consultation, alliances

#### 3 SOURCES OF INFLUENCE

Make me

Authoritative approach

Tell me

Sales approach

Show me

Grassroots approach



What is the most important thing you want your leadership to do differently?

What is the next conversation you will have with them to improve results?

#### SO...WHAT WAS THAT ABOUT THRIVAL AGAIN?

The world needs you more than ever

Creating thrival is within your power

 Build a culture that supports fundraising, spend time on what matters most and bring your leadership along for the ride



#### SO...WHAT WAS THAT ABOUT THRIVAL AGAIN?

 You're the master of your domain – you can choose what to do from here

It takes time, patience and resolve – but stick with it

We're here for you

Lead from where you stand

Ask for help – that's okay



# KEEP MOVING EORWARD

#### Thank you!

Write: "Free Consult" on your card and get a 60 minute conversation about you.

@kimberleyCanada

k@kimberleymackenzie.ca

289-231-1339

www.kimberleymackenzie.ca





