

Training Champions

8 Ways to
Bring Out
the Best in
Your Major
Gifts Team

By ELIZABETH B. HERMAN

Do you supervise:

A talented major gifts officer who worries too much?

A high-performing soul who balks under pressure?

A perfectionist whose productivity can be hijacked for days after a critical comment?

Are you that someone?

No matter what your title, you may believe that the only way to raise more money is to jack up your goals, work longer hours, and increase the demands on yourself and your team. I get this. I lived this. For 25 years. But my experience working with conscientious, often anxious individuals, both human and equine, has revealed a better way to lead our fundraising teams.

In 2004, at the peak of a successful fundraising career, I accepted a vice presidency at a college I loved with a boss I admired but feared. Our personalities were an iffy match, but we tried to make it work. With our staff, we raised record gift income at a ferocious pace. After 11 breathless months, I left.

To recharge before my next vice presidency, I fulfilled a lifelong dream and bought a young former racehorse to compete in jumper shows. Gracious Me, or GM, jumps brilliantly, but only when she is ridden by someone who takes a kind approach, respects her quirks, and uses gentle hands. GM's a Thoroughbred, that venerated, sensitive breed designed to race long distances with heart. Some Thoroughbreds leave the track to excel in the hunter or jumper world, but only if they find riders who have the knowledge and patience to develop their gifts.

GM was fortunate to find me. She came from an owner and rider who pressed her too hard. That relationship ended when the rider pushed GM to jump higher than her ability allowed; she slammed on the brakes, dumping her rider in the dirt.

The first time I got on GM she jiggered sideways and tossed her head, fearing the worst. I rubbed her neck and waited for her to settle before I loosened the reins and asked her to trot. During the next three years, my trainer and I earned this sensitive horse's trust, progressing slowly at first—and then quite quickly—through the show jumping ranks.

GM taught me volumes about working with intelligent high achievers prone to stress. In development shops that have become pressure cookers, how successful might we be if our leaders learn to calm themselves so that they can guide others with gentle hands instead of iron fists? To that end, I offer the following principles of Thoroughbred management to help you bring out the best in every member of your fundraising team for better relationships, staff retention, and total gift income.

MATCH ABILITY AND TEMPERAMENT TO THE JOB

Before hiring, ask yourself, Do I need an exact match for one job? Or do we have the bandwidth to adjust work responsibilities as we discover this individual's strengths and preferences? We can't all negotiate million-dollar gifts or make endless cold calls to disengaged alumni, but there's a right role for each skilled, persistent soul. Seek the real truth from each candidate: Who are you? Where have you been? What do you want to do?

Some riders like flashy red horses, and many advancement leaders like to hire people like themselves. In both instances, snap judgments about what you like can blind you to weaknesses in your candidate. If that big red horse jumps in bad form or that articulate new gift officer harbors a deep-seated discomfort with discussing money, neither will succeed. "Easy to buy, hard to sell," say old horsemen to overeager clients, and this is just as true in hiring development staff.

ALLOW AUTONOMY AND CELEBRATE SMALL WINS

As managers, most of us push too much, even with good performers. Next time you seek an outcome, define the task with clear boundaries, then step back and let your employees show you how they work best. When they err, reduce pressure for a moment to give them the opportunity to self-correct.

Acknowledge small steps toward performance goals. In *The Progress Principle*, business professor Teresa Amabile and psychologist Steven Kramer demonstrate how celebrating small wins throughout large tasks in real workplaces improves employee loyalty, retention, and persistence. Innovative development shops are enhancing their quantitative performance metrics with new competency ladders designed to train and

reward a new hire through promotions, salary steps, and new assignments.

Such incremental skill-set development might include gathering useful information and evaluating philanthropic potential on donor visits, confirming the amount and

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purpose of a proposed gift before solicitation, and effectively engaging natural partners in development work. Seeing a clear path to advancement encourages gift officers to develop the soft qualitative skills that secure the largest gifts over time.

Why isn't this happening everywhere? Partly because of the deeply held, distinctively U.S. concern that praise and ease breed laziness. But is that true? Do capable knowledge workers need a whip and spur to drive their success? Or do we all desire to be ridiculously successful at our jobs?

Both the annual fund officer who has brought home his first \$10,000 gift and the seasoned gift planner down the hall who just got a no on a very big request will repay your investment tenfold if you offer them, respectively, a sincere celebration with colleagues and a spontaneous day off. Just like donors, fundraisers merit special handling.

MAKE PROMPT, FAIR CORRECTIONS

Whenever an employee is expending big effort for small return, it's our job as mentors to step in and create the conditions for success by providing resources, training, and support. Wise management and good riding both require nuanced problem-solving on the fly.

A show jumper isn't shown the course of jumps before entering the ring. She must trust her rider enough to gallop on and clear the obstacles, often from very tight turns. The first time GM stopped with me

at a spooky jump, I nearly fell off. Many trainers would have had me discipline her to declare my dominance. Instead, my trainer lowered the top rail and told me to keep my leg support strong and jog GM back up to the obstacle. She balked, peeked,

and then hopped over with room to spare, earning praise and pats. The trainer then raised the rail to its original spot. GM and I jumped it both directions with increasing speed and confidence before ending the lesson on a high note.

If your field fundraisers are missing their monthly targets, ask them what they need to succeed. One college I know had a largely uncultivated prospect pool that skewed young. The new development director kept running into outdated contact information. Impeded by the need to Google name after name, she started fretting about her productivity. Her smart bosses decided to invest in database research while redirecting her considerable energy to visiting lapsed donors so she could find early success.

I also worked with a chief development officer who seemed well-suited to his new management position, but something worried him. In his prior positions, he had experienced very little of the one-on-one major gifts training and mentoring he would need to guide his own new hires. Together we trained his team members so that they shared a common language, objectives, and techniques. Careful training builds confidence.

IF YOU GOT IT WRONG, END IT WELL

Sometimes we hire the wrong candidate or our needs change. When you can't train your way out of a problem, it's best to terminate the employee who isn't working out. Once you're certain that an employee

can't or won't do the work, make that change thoughtfully and sparingly. In our close-knit advancement world, it doesn't pay to be known as someone who churns through stock, lest others avoid sending fresh talent your way.

INSPIRE FOLLOWERS WITH CLEAR INTENTIONS

When work teams get stuck, I ask these pointed questions: What is most important for us to do now and why? What is the best, easiest, most joyful way to achieve this goal? What's in our way? Is our plan explicit, realistic, and understood?

If you've ever been to a campaign planning meeting where the goal feels too high, you've seen people get small and shrink back. It's similar to the body language of a horse that is asked to jump higher than its conformation or training permits.

Great leaders notice discomfort and stop to ask questions. They listen to concerns about the database, re-examine the gift table and prospect list, and retool the campaign budget to ensure the goal is a doable stretch.

According to horse whisperer and management trainer Koelle Simpson, many people toggle between two modes of leadership: domination or ingratiating. All horses—and most humans—don't respond well to either one. Just as pushing too hard fails your followers, flimsiness sinks leaders

centered, compassionate leaders who communicate an appealing vision, are in tune with the environment, and can keep their followers safe. Anyone who has worked at an ambitious institution where it is safe to take chances and make mistakes knows this: When employees have a fair and clear task, the skill and tools to achieve it, and leaders who believe in and support them, work feels like play.

CHECK YOUR ENERGY AT THE DOOR

We have been taught at school and work to rely on our minds and ignore our bodies and emotions. Trying times require that advancement leaders learn to tune in to the whole human system—cognitive, emotional, and physical.

The nervous system has two operating modes: The sympathetic nervous system drives the fight-or-flight stress response, and the parasympathetic nervous system supports what Herbert Benson, a professor at Harvard Medical School in Massachusetts, calls the relaxation response. Guess which mode works better in delicate development work?

Being a leader can cause stress that activates hormones like epinephrine, norepinephrine, and cortisol, according to organizational behavior experts Richard E. Boyatzis and Annie McKee. The release of these hormones diverts blood flow to the large muscles, preparing us to fight or run;

Research suggests that 60 to 70 percent of all meaning in interpersonal communication is derived from nonverbal cues—posture, energy level, eye contact, and facial expressions. Emotions and energy levels are viral—leaders must be intentional about what they transmit because it will spread. Rushing into a meeting with your hair on fire creates a panic ripple that slows your team members down before you even open your mouth. They must calm their nervous systems and re-engage their cognition before creative problem-solving can resume.

I teach my clients what I practice as a jumper rider—I pause before important events, soften my focus, and take at least three deep breaths to slow my heart rate and thoughts so that I can perceive everything around me. Indeed, centering oneself to focus on others' feedback is the single most powerful, most trainable, and least discussed leadership skill I know.

MANAGE FROM THE INSIDE OUT

By understanding and caring for ourselves as leaders, we'll have more to give. Managers' worst mistakes arise from fear, exhaustion, or both. And it's our thoughts, not actual threats, that create most of our fears. The more we replay stressful thoughts in our minds—even those intended to be motivational—the more tired and raw we become over time.

Great leaders notice discomfort and stop to ask questions.

too. In conference rooms and show rings alike, leaders who convey confusion and doubt will have difficulty getting their teams to follow them over new hurdles. In the face of a challenge, a good manager addresses his own fears, clarifies the plan, and leads with confidence.

Horses and humans are drawn to calm,

increases blood pressure; and shuts down nonessential (creative) neural circuitry, thereby reducing our capacity for flexible, creative thought. (And listening too.)

"Adrenaline up, learning down. Adrenaline down, learning up," observed the old horse whisperers long before neuroscience proved them right.

When we leaders rush ourselves—and others who are already hurried—we don't see greater productivity; we get pointless spinning. Fundraisers who are running scared or dulled by fatigue may avoid scheduling high-stakes donor visits or, once there, may miss the cues inviting them to learn more about a donor's deepest motivations.

Learning to release anxiety and stay in the present enables us to pick up on subtle cues that yield new strategies, referrals, and major gifts. And all of this takes practice.

According to the National Science Foundation, humans have between 12,000 and 50,000 thoughts per day, the vast majority of which are negative. Science writer and ethicist George Dvorsky notes that most of our thoughts dwell in the past as we obsess about our mistakes or battle guilt. As a facilitator and coach, I teach people to observe, question, and upgrade their least helpful thoughts so that they can generate peaceful, powerful, resonant leadership.

LEAD WITH LOVE

Punishment and fear are risky accelerants that can generate big leaps and win one or two races, but they leave you scorched, sour, and lame in the long run. Punitive management techniques break trust between

employees and leaders, create expensive vacancies, and impede the creative development of our institutions' most important donor relationships. Learning to lead ourselves with compassion lets us draw out best efforts from others too.

Most of us entered advancement work inspired by a love of people and a desire to change the world. As goals rise and budgets don't, we need to put that love into everything we do for and with our teams. Leading with love can inspire your Thoroughbreds—and your own best self—to clear obstacles you would have never before attempted and achieve brilliant results you would have never dared dream. ■

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Thank You!

The CASE Asia-Pacific Advancement Conference 2013, held in Singapore, March 19 – 22, was a resounding success with attendance of more than 300 international delegates. The CASE Asia-Pacific team expresses our deepest appreciation to the conference planning committee, speakers, delegates, sponsors, exhibitors, supporters and volunteers for all their support and contributions.

See you at the
CASE Asia-Pacific Advancement Conference 2014
in Hong Kong!

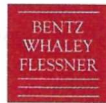
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