



Advancing Philanthropy Worldwide

CARTER



Creating Dynamic Tension for Fundraising Success

October 29, 2019



Steve Higgins, CFRE
President

Lenora Ritchie, APR, CFRE
Vice President



Who's In The Room?

- President, CEO, Executive Director
- Development Director
- Board Member/Volunteers
- Type of organization? Supporting Org?
- What made you want to attend this session?



Scenario...

You're in charge of the fundraising orientation for new board members.

Think about...

How you want board members to feel when they leave?



Scenario...

As you lead the fundraising orientation ...

What words come up in your presentation?

Any of these:

Identification

Prospects

Cultivate

Solicitation

LYBUNTS and SYBUNTS

How do you think your volunteers felt?



Scenario...

What you meant may not be **what they heard**



Intent

vs



Impact



The tension is inherent

Development Professionals

1. Trained in the jargon
2. See the big picture
3. Have experience

Board Members

1. Different perspectives
2. Varying experience
3. Uncomfortable asking for money



Is tension always bad?

- Smart people, different skills...sooner or later there is going to be a disagreement!
- How we approach the disagreement makes all the difference.



The father of Dynamic-Tension

THE INSULT THAT

HEY! QUIT KICKING THAT SAND IN OUR FACES!

THAT MAN IS THE WORST NUISANCE ON THE BEACH

LISTEN HERE. I'D SMASH YOUR FACE... ONLY YOU'RE SO SKINNY YOU MIGHT DRY UP AND BLOW AWAY.

Awarded the title of "The World's Most Perfectly Developed Man."

Charles Atlas

DARN IT! I'M SICK AND TIRED OF BEING A SCARECROW! CHARLES ATLAS SAYS HE CAN GIVE ME A REAL BODY. ALL RIGHT! I'LL GAMBLE A STAMP AND GET HIS FREE BOOK!

BOY! IT DID! DO THIS FOR A BULLY WON

LATER

WHAT! YOU HERE AGAIN? HERE'S SOMETHING I OWE YOU!

OH, MAC! YOU ARE A REAL MAN AFTER ALL!

CHARLES ATLAS ON TV

WIN THIS VALUABLE TROPHY

5 FREE GIFTS

If you act now, in addition to my complete course, you will also get these five valuable outline courses.

NOW... HERE'S A NEW MAN

Let Me PROVE I Can Make YOU A NEW MAN!

The advertisement is a vintage promotional piece for Charles Atlas's 'Dynamic Tension' system. It features a large, muscular man (Charles Atlas) in the center, wearing patterned swim trunks. To his left is a small photo of him on TV and a trophy. To his right is a comic strip titled 'THE INSULT THAT' showing a sequence of events where a man is bullied on a beach, then gains a 'real body' after following Charles Atlas's advice. The comic panels include dialogue like 'HEY! QUIT KICKING THAT SAND IN OUR FACES!', 'THAT MAN IS THE WORST NUISANCE ON THE BEACH', 'LISTEN HERE. I'D SMASH YOUR FACE... ONLY YOU'RE SO SKINNY YOU MIGHT DRY UP AND BLOW AWAY.', 'DARN IT! I'M SICK AND TIRED OF BEING A SCARECROW! CHARLES ATLAS SAYS HE CAN GIVE ME A REAL BODY. ALL RIGHT! I'LL GAMBLE A STAMP AND GET HIS FREE BOOK!', 'BOY! IT DID! DO THIS FOR A BULLY WON', 'LATER', 'WHAT! YOU HERE AGAIN? HERE'S SOMETHING I OWE YOU!', and 'OH, MAC! YOU ARE A REAL MAN AFTER ALL!'. Below the comic, there's a section for '5 FREE GIFTS' and a large headline: 'Let Me PROVE I Can Make YOU A NEW MAN!'. The background is a solid dark color.



Dynamic-Tension – Catalytic Results





Two Mindsets

Positive Dynamic-Tension Mindset

- Disagreement is natural
- Debate is interesting
- Differences of opinion can lead to new, creative and innovative solutions

Conflict Mindset

- Disagreement is an attack on my integrity
- It's personal and aggressive
- I can't show weakness



Dynamic Tension



- The space between current reality and vision for the future
- Leaders must hold the vision tight, *but not too tight*



Why do nonprofits need Positive Dynamic-Tension?

- Synergy and energy lead to engagement and productivity
- Relationships and expertise are put to highest and best use
- Attract great people
- Satisfaction for all – board members, staff members, donors and volunteers
- Prevent complacency and indifference



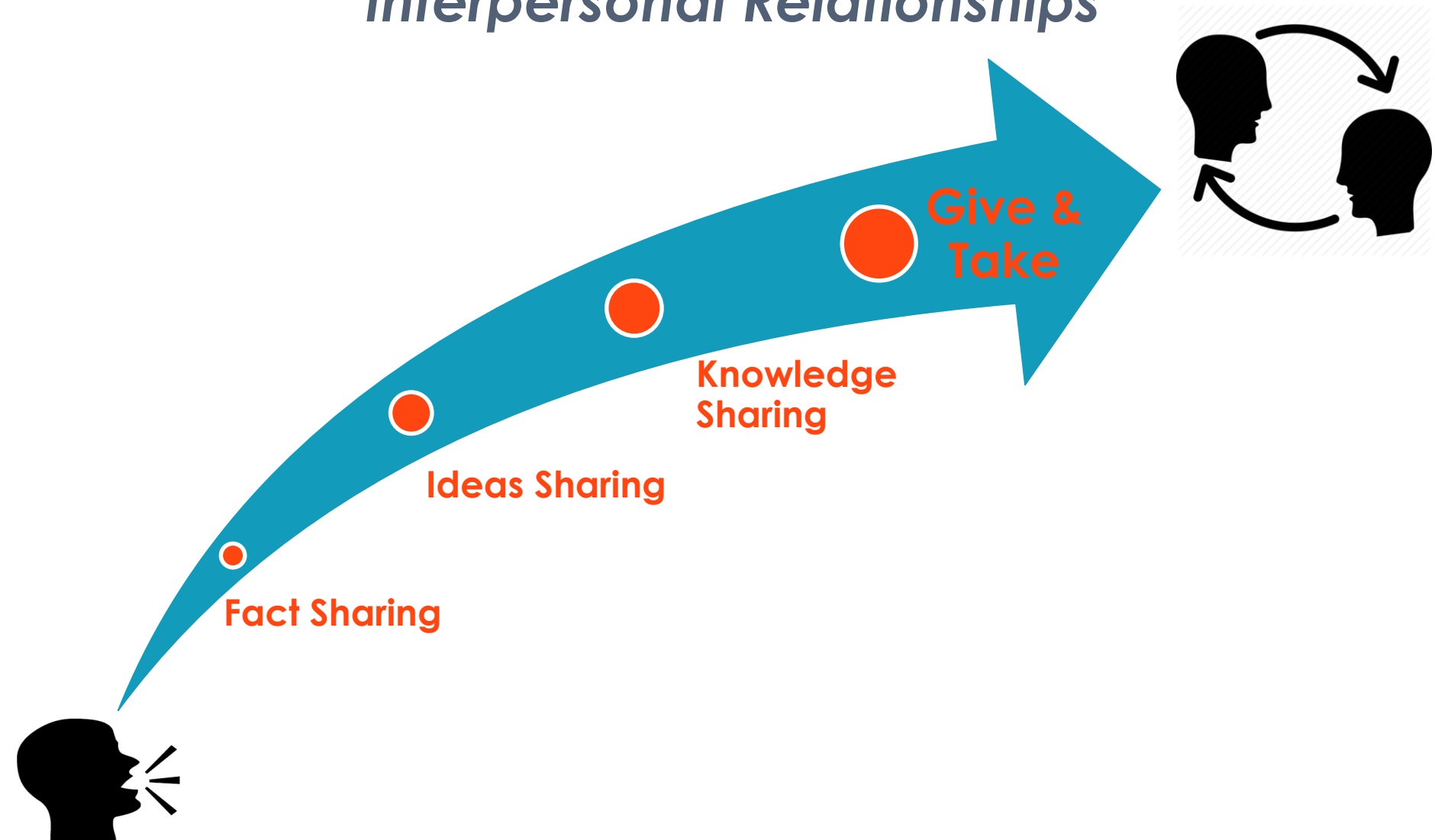
Characteristics of a Successful Board-Staff Partnership

- Trust
- Division of Labor
- Communication
- Clear Expectations
- Strategic Thinking
- Culture of Candor



How do we create Dynamic-Tension?

Interpersonal Relationships





How do we create Dynamic-Tension?

Level of Trust

- Culture of Trust organization wide (*board-CEO; volunteers-staff*)
- Agree on expectations
- Invest time
- Don't just know your volunteers, identify with them

“Trust is like the air we breathe. When it's present nobody really notices, but when it's absent, everybody notices.”

Warren Buffet



How do we create Dynamic-Tension?

Focus Work

- Clear roles and training
- Customized plans
- Be open to new ideas
- Track more than money



Whose Role Is It?

BOARD

- Adopt Board Policies
- Evaluate CEO
- Approve Strategic Plan
- Determine Mission & Vision
- Select Board Members
- Review/Approve Budget
- Hire CEO
- Outline Strategic Framework

SHARED

- Fundraise
- Schedule Strategic Planning
- Generate Organization Values
- Thank Donors
- Set Board Meeting Agenda
- Advocacy

CEO/STAFF

- Hire Staff
- Operationalize the Strategic Plan
- Enforce Gift Acceptance Policy
- Conduct Staff Evaluations
- Manage fiscal & program resources
- Develop new programs
- Create the Budget



SUCCESS!

- When one moves, the other adjusts
- Know your roles, but communication is even more important!

FLOP!

- What went wrong?





Fundraisers Must

- Avoid working in isolation due to a lack of confidence in volunteer leadership
- Not become pigeonholed as being solely responsible for fund development
- Recognize that each board member brings a unique set of skills to their organization
- Avoid lecturing *en masse* to the board about their role as fundraisers



Embrace Your Board

- View your board as an asset, not a hindrance to fundraising success
- Teach board members how to become passionate advocates, ambassadors, askers and stewards
- Determine their personal philanthropic goals





Manage Up

- Make your goals, the board's goals
- Your success will be a bi-product of making those above you successful
- Provides an opportunity to showcase your leadership and value
- Managing up eliminates a strictly vertical organization
- Great ideas die in top-down/vertical organizations



Who do we manage and why?

- **CEO/ED** – They will appreciate having you collaborate with them to capitalize on opportunities
- **Board members** – They must receive support and accountability from staff to succeed
- **Volunteers** – They want to help, but often don't know how best to





Role of Development Professional

- Humbling at times
- Hired gun or engineer?
- Position others for success
 - Board
 - CEO/ED
 - Volunteers
 - Other staff
 - Humbling at times
- Transfer your knowledge and skills to everyone in your organization





Role of Development Professional

What do the very best do?

- Make everyone around them successful
- Listen to donors and volunteers
- Manage “air traffic”
- Treat all donors and volunteers differently
- Infuse their organization with confidence
- Challenge the organization to think **BIG**



Creating a Culture of Philanthropy

- Engaged and willing board
- Everyone embraces a shared **BIG VISION**
- Dynamic tension between board & staff
- Transparency
- Shared expectations and desired outcomes
- No egos
- Language grounded in philanthropy, not charity



Charity vs. Philanthropy

A Culture of Philanthropy requires a shift in thinking from charity to philanthropy.

Charity (giving)

Problem

About money

Short-term crisis

Organizational needs

Impulsive giving

Short-lived satisfaction



Philanthropy (investing)

Solution

About mission

Long-term vision

Community needs

Thoughtful investment

Satisfying outcome



What's your culture of philanthropy?

**Do your staff and volunteers view
fundraising the primary function?**

or

**Is fundraising viewed as the “servant”
of vibrant Culture of Philanthropy?**

Let's measure it!



Thank you!

Steve Higgins, CFRE
President

(772) 559-7260

shiggins@carter.global

Lenora A. Ritchie, APR, CFRE
Vice President

(772) 473-6199

lritchie@carter.global

www.carter.global

