

## **Choosing your road: organizational development specialist or just another fundraising technician?**

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There are fundraisers and organizational development specialists – the latter classified as change agents serving the entire organization and looking beyond the immediate need for funds.

Guaranteed. Every organization needs its own in-house organizational development specialists to survive and flourish. And the development officer should be one of these specialists. What is a great development officer but a fundraising technician + an organizational development specialist?

You choose whether or not you want to be more than a great fundraising technician. You must be willing to adopt an organizational development approach to the work of philanthropy and fundraising. Then you can develop your capacity.

P.S. Probably more than 75% of “fundraising problems” are not fundraising problems at all. They are organizational development issues – that affect fundraising!

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### **First, let’s look at your organization.**

Fund development is about much more than asking for money.

Sure, fund development includes solicitation strategies, response rates, case statements, volunteer management, and asking for money.

But fund development is about everything else in your organization first. And it’s the “everything else” that’s so challenging and often messy. It’s the “everything else” that reaches out and affects every area of performance.

What’s the “everything else”? Consider this:

- Is your organization sufficiently relevant to the community to secure sufficient support – e.g., respect, clients, board members, volunteers, good will, and also donors and gifts?
- Does your organization effectively foster relationships with diverse constituents including clients, community decision-makers, media, regulators, and so forth?
- Are your staff effective enablers, empowering volunteers to do the best they can – volunteers of all kinds including direct service, fundraising, board members, and so forth?
- How effective is your organization at planning and decision-making, and securing quality information to plan and make quality decisions?
- Does your organization regularly examine itself and the external environment, discussing the findings and learning and changing when necessary?

- How effective is your organization at clarifying roles and identifying necessary skills and distinguishing between governance and management?
- What do your leaders do and what do you do to develop leaders?
- And what you're the values and corporate culture of your organization?

These are all organizational development issues. Each of these – and more – affect your ability to raise charitable contributions. (Just keep in mind: Most of your fundraising problems aren't fundraising problems. They are organizational development problems first. So who will fix those organizational development problems so they don't negatively affect the development program?)

Your organization is one system. And what happens in one part of a system affects what happens elsewhere in the system. It's all interconnected.

“Organizations are complex systems that interact constantly and significantly with a host of other equally complex systems. The most important property of these systems is that they cannot be broken down into parts that have separate lives of their own. Thus, in an organization, no basic functions, departments, or objectives exist independently of one another.” (*Framebreak, the Radical Redesign of American Business*. I. Mitroff, R. Mason, and C. Pearson. San Francisco: Jossey-Bass, Publishes, 1994.)

Systems thinking is the cornerstone for organizational development. Systems thinking means seeing interrelationships rather than linear chains. You see a whole whose parts relate and operate for a common purpose. You see processes of change, rather than snapshots of activity.

Systems thinking helps your organization understand how its actions have created current reality. Then, as a learning organization, you dialogue, asking the meaningful questions and questioning your assumptions. You learn and change as necessary.

Systems include both detail and dynamic complexity. Detail complexity refers to many individual variables that seem not be related. Dynamic complexity focuses on the whole system and its interrelated parts. Dynamic complexity exists when the same action has dramatically different effects in the short and long run, when an action has different consequences in different parts of the system, or when obvious interventions produce non-obvious consequences.

Fund development includes both detail and dynamic complexity. But fundraising technicians tend to focus more on detail complexity. They can be overwhelmed by the many variables of fund development, losing the big picture of organizational development.

On the other hand, the most effective fundraisers, those who are also organizational development specialists, recognize the importance of dynamic complexity. They see the whole system – fund development and organizational development – and its interrelated parts. These fundraisers act as systems thinkers, seeing when and how a change in action or structure can generate significant and enduring improvement.

Philanthropy and fund development do not merely serve the organization's “greater purpose” or its “true” mission.

Your organization's mission is not just about saving the whales or feeding and sheltering the homeless or educating youth. Your organization has 2 missions: saving the whales + philanthropy and fund development. Or educating youth + philanthropy and fund development.

Philanthropy and fund development is an additional mission to every nonprofit organization – equally important and sacred in its own right. Not just a means to fulfill your other mission.

Philanthropy – and its essential partner fund development – is inherent in a nonprofit, non-governmental organization. Your philanthropic mission is what it means to be a nonprofit organization.

All of this is organizational development work. And organizational life is all about organizational development work. It's complex and complicated. It involves conversation and disagreement and process.

We need to change the way we do fund development. We need to change the way we build organizations.

Why bother? Because the reward is a healthy, viable and effective organization. Because the reward is organizational survival. And finally, because the reward is strong philanthropic organizations that make a difference in their communities.

## **So who should be the organizational development specialist in your organization?**

First, there should be more than one!

The board of directors should hire a chief executive officer who is an organizational development specialist. The chief executive officer should hire some senior managers who are organizational development specialists. And the chief executive officer had better hire a chief development officer who is an organizational development specialist.

## **Now let's look at you, the fundraiser**

Do you help your volunteers successfully solicit major gifts? Can you write a good direct mail letter? Does your development office run well?

Then chances are your fundraising technical skills are good, if not great.

Technical fundraisers are in abundance. They focus almost exclusively on case, prospects, and volunteers to meet their organization's financial need. They isolate a challenge or opportunity and devise a response.

But being a technician is not enough. It never has been – even though the fundraising profession seems to have pretended so for decades.

There's another kind of fundraiser, a more enlightened one. And if you aspire to this next level – from technician to accomplished fundraiser – then transform yourself.

### **The accomplished fundraiser**

Let us first distinguish the accomplished fundraiser from the fundraising technician.

Whether by choice, limited skills, or organizational constraints, fundraising technicians spend their time targeting prospects and managing volunteers. These professionals develop the organization's stories into a case for fundraising support.

The best technicians believe deeply in their causes, understand philanthropy, know how to create infrastructure, document activities, and delineate roles. These excellent technicians use sophisticated solicitation strategies, negotiate major gifts, engage donors, and provide competent support to volunteers.

On the other hand, the accomplished fundraiser is an organizational development specialist. She expects access to all parts of the organization and convinces the chief executive officer of this need.

The organizational development specialist is familiar with contemporary management theory and uses it to expand the organization's view of fund development and organizational development.

She probes deeply into areas of the organization that fundraising technicians would consider out of bounds. Areas such as board recruitment, helping devise programs that are relevant to the community, and involving all staff in the process of developing relationships that support the organization.

She actively participates in governance, organization-wide strategic planning and evaluation, community needs assessment, and marketing and communications.

The accomplished fundraiser is a systems thinker, seeing both the forest and the trees. He knows what makes systems work and what makes them flounder.

He's a consummate enabler, empowering volunteers and staff to participate meaningfully on behalf of the organization.

He's a critical thinker, asking the tough questions about fund development, organizational operations, and relevance to the community. He's a strategist, who helps the organization determine where it wants to go and how to get there.

The accomplished fundraiser identifies relevant information and helps others understand the implications of the information. He anticipates and solves problems and takes advantage of opportunities across the organization.

### **The road to transformation**

Being a technician is not enough. It never has been.

Whereas fundraising technicians can, and often do, succeed, staying at this level leaves you and your organization vulnerable. For instance:

- Your organization can be blind-sided by events happening externally and even internally. Sooner or later these events will affect your fundraising activities and your donors.
- Your organization's mission may be out-of-date and your programs may no longer be important to the community. Eventually your constituents will notice and leave. Your donors will stop giving.
- Your donors may not feel close enough to your organization. Small gifts will not become larger ones and donors may not renew their gifts.

None of these situations is new. They were true yesterday and will be true tomorrow. The only difference may be in the quickness and frequency with which they occur, the time and effort it takes to recover, and the increasing frustration experienced by donors, volunteers, clients and staff.

In all of these instances, an accomplished fundraiser would be a pivotal player. She monitors activities and projects trends inside and outside the organization. She stays in touch with community needs and priorities to keep the organization relevant. She builds constituent loyalty through constant communications and cultivation.

How does remaining a technical fundraiser affect the bottom lines? One thing is certain. Thinking like a technician and focusing only on short-term actions won't increase revenue. Why?

- Most fundraising challenges stem from the organization and its operations, not from fund development. You must be able to discern the true nature of the situation in order to solve it.
- There's major fundraising congestion in communities. Your organization cannot distinguish itself with a better letter or a "more special" special event. Instead, you may need to

overhaul fund development. You may need to change the way you do the business of your organization, and even what that business is.

- Finally, fundraising has never been solely about money. It's always been about relationships: understanding someone's interests and finding a match with your organization; or, accepting their disinterest and moving on. Simply focusing on dollar goals, response rates, and prospect research won't work, without forging a deep relationship between the organization and the prospect.

The accomplished fundraiser is fully aware of these realities. She uses her knowledge and skills as an organizational development specialist and enabler to help the organization learn and change.

As for the process of transforming yourself, unfortunately, there is no "10-step program" to move from technician to accomplished fundraiser. This transformation is not as much about skill development as it is about attitude, expanded knowledge, and taking action. The transformation is neither orderly nor linear. Instead, you expand attitude, knowledge, and skill and take action simultaneously.

First is your own personal commitment. Your transformation depends upon self-development. Honestly evaluate yourself. Commit the necessary time and effort to learn and grow.

Second is a willingness to expand your knowledge, in effect making your organization more dependent on you. You do this through self-study, continuing education and discussion with colleagues.

Make sure you know enough about your organization's program and services so program staff recognizes your value in this arena.

Move beyond fund development and the nonprofit sector. Look elsewhere for your learning – and demand that your professional associations expand their continuing education beyond fund development and nonprofits. Learn lots about the theory and practice of management and organizational development.

Third is assertiveness -- convincing your organization to let you into the whole system. Be persistent because convincing takes lots of personal conversations and repeated small and large acts on your part. Be patient. Change takes time and there may be some confusion and struggle along the way.

Fourth is a willingness to practice the knowledge, skills, and attitude of an accomplished fundraiser. One of the best ways to practice is serving as a board or committee member for another organization.

Why should you bother to be an organizational development specialist? Because that is what will make a difference in your organization, its health, vitality and survival. And that is what will make a difference in your career as a professional also.

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## **Resources for the organizational development specialist**

"When you know what to do when there is something to be done – that is tactics. When you know what to do when there is nothing to be done – that is strategy. (*The Ruins of Ambrai*, Melanie Rawn, New York: DAW Books, 1994.)

## **Organizational behavior**

- Study of individuals and groups within organizational settings
- Social system
- Humanistic orientation (principles of human behavior)
- Performance oriented
- External environment has significant impact
- Interdisciplinary field

## **Organizational development**

- Process of:
  - making organizations work
  - preparing for and managing change in organizational settings
  - managing individuals, groups, systems and culture as resources of an organization
- Understanding how actions of people in organizations affect behavior, structure and processes
- Systems thinking
- Depends upon the ability of individuals, groups and the organization itself to learn
- 3 characteristics common to all organizations: behavior (corporate culture), structure, and processes

## **Behavior (corporate culture)**

- Personality of an organization and the way your members interact and behave.
- Not written. Rarely discussed but pervasive.
- “The set of rarely articulated, largely unconscious, taken-for-granted beliefs, values, norms and fundamental assumptions the organization makes about itself, the nature of people in general, and its environment...organizational culture consists of the set of unwritten rules that govern acceptable behavior within and even outside of the organization.” (*Framebreak, The Radical Redesign of American Business* by Ian Mitroff et al)

## **Group behavior**

- Affects ways you make decisions
- How well you identify and resolve issues and how you negotiate conflict
- Group dynamics - some cohesion is necessary but not too
  - Member satisfaction from participating in group
  - Pride of membership in group
  - Ability of members to address the crises that face the group
  - Degree to which members of group express their ideas and feelings honestly much (GroupThink and Abilene Paradox/ability to manage agreement represent too much cohesion)

## **Structure: systems**

- Permanent structures that direct flow of what happens
- Includes core processes, management and governance hierarchy, and informal networks.
  - Core processes are those that you cannot do without. Include such things as financial and personnel management, board recruitment and development, etc.
  - Hierarchy defines relationships of individuals and groups. Assigns authority and accountability.
  - Informal networks refer to organization’s practices. Not codified but reflect corporate culture. “Everyone knows this is the way we really do business.”

## **Process**

- Process involves a lot of thinking, talking, exploring – and engages all the stakeholders

- Comfort with complexity often extends to comfort with process. Reverse is also true. Those who are not comfortable with complexity are not comfortable with process. They feel out of control and felling out of control for some feels like losing power. For others, feeling out of control is empowering.
- “To relate, to be connected, one must pay attention, and paying attention is what process is all about. If comfort with complexity is the ability to hold and deal with conflicting problems all at once, comfort with process is a tolerance for the gradual unfolding of surprise.” Joline Godfrey, [Our Wildest Dreams: Women Entrepreneurs Making Money, Having Fun, Doing Good](#)

### **What do you have to have to be an organizational development specialist?**

- Necessary knowledge areas
- Certain competencies and expertise
- Appropriate attitude and behavior

### **Necessary knowledge areas**

- General business management and nonprofit management and governance
- Group and organizational behavior
- Systems thinking and values clarification
- Strategic and program planning and evaluation
- Fiscal planning and management
- Volunteer and staff development, role delineation, performance expectations and assessment, recruitment and training, and release
- Marketing and communications
- Enabling functions (with both staff and volunteers)
  1. Transmit the organization’s values.
  2. Engage people in the meaning of the organization.
  3. Respect and use the skills, expertise, experience and insights of both staff and volunteers.
  4. Provide direction and resources, remove barriers, and help develop skills of individuals and groups within the organization.
  5. Articulate expectations and clarify roles and relationships of both staff and volunteers.
  6. Communication (which includes helping people transform information into knowledge and learning).
  7. Encourage people to question organizational assumptions and ask strategic questions.
  8. Ensure quality decision-making.
  9. Anticipate conflicts and facilitate resolution.
  10. Engage volunteers and staff in process as well as tasks.
  11. Encourage staff and volunteers to use their power, practice their authority, and accept their responsibility.
  12. Model behavior.
  13. Coach people to succeed.
  14. Manage.
  15. Enhance attrition of volunteers and staff when necessary.
  16. Monitor, evaluate, and enhance enabling.

### **Necessary skills of organizational development specialists**

- Facilitation skills
- Conflict resolution skills
- Proficient teacher and learner

- Effective communicator (listening, informing, and helping to transform information into knowledge and learning)
- Critical thinker (anticipating problems, identifying solutions, and redirecting resources)
- Strategist (analyzing situations, identifying barriers and opportunities, capitalizing on strengths, and ensuring action and results)
- Effective motivator; manage people well
- Effective enabler

### **Attitude and behavior of organizational development specialists**

- Willing to share decision making
- Respect and trust others
- Trustworthy yourself
- Welcome divergent opinions
- Question your own assumptions
- Flexible and comfortable with conflict and change
- Commitment to process
- Appreciate conversation and disagreement
- Patient and persevere

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