

# Three steps to leading a great donor experience

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## Project 17. Leadership

Rob Woods, February 2017

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### **The original brief**

There's no doubt that high quality, inspirational leadership is the lynchpin in any organisation's approach to and expectations from fundraising. Yet it's an area that suffers from premature turnover and underinvestment as well as misunderstanding. Building on previous learning this project will define what makes great fundraising leaders and what leadership they need from their senior management colleagues and their board if they are to deliver the competent, motivating leadership that will sustain and direct the new style of fundraising that is evolving in Britain.

### **For senior management and trustee boards, this project will:**

- Show how they can demonstrate leadership in being donor-focused and encourage their fundraisers to do the same.
- Promote the idea of connecting fundraisers and front line staff, so the organisation's purpose is embedded into fundraising.
- Help them to promote leadership at all levels of the organisation through trusting staff and empowering them to make donor-focused decisions.
- Show why investing in ongoing learning and development will help create an environment where great fundraising can flourish.

### **For donors, this project will:**

- Increase the confidence of donors that the fundraising profession is well lead and ethical.
- Increase the opportunities for donors to be inspired by the purpose of the causes they support.

## Summary

What kind of leadership increases the chances that a charity will operate in a donor-centred way?

This is the question we sought to answer in this project. Our primary means of answering the question was to interview 16 leaders who are considered by experienced fundraisers to be both effective leaders *and* to lead in ways that are donor-centric. We also drew on existing books, courses and reports on fundraising and leadership.

Anyone who cares about a particular problem or injustice in the world might want to help a charity that addresses that issue in more than one way, and yet many charities are led in a way that reduces the chances that supporters will be treated as complete human beings, rather than merely, for example, ‘major donors’ or ‘campaigners’. For charities to become smarter in the way they treat supporters, leaders of charities need to act differently.

Additionally, as technology has made the external environment more fast-moving and unpredictable, the need for a new kind of leadership is stronger than ever. Charities now need to be able to respond much more quickly. To be able to adapt, people need to be aware of issues beyond their own job descriptions or donor categories; they need to be able to use their initiative and be empowered to act.

We have found that there are relatively few leaders who are both very effective and whose objective is to help make their organisations be donor-focussed. The ones who have both these qualities act less like chess-masters – knowing all the answers, seeing every move that is needed on the board, deliberately implementing carefully planned strategies – and more like gardeners. They see their role as nurturing the right environment, one in which everyone knows the common goal and is empowered to take action.

The most effective donor-focussed leaders have the same attitude to developing great relationships with their colleagues –nurturing, collaborative and empowering – as they strive to be with their charity’s supporters.

We believe you can improve your chances of leading in this way by focussing on three areas: vision, people and culture.

Vision - Define and champion what success looks like, and why it matters.

**a) Your organisation’s purpose - focus attention on why changing the way you work with supporters is something you must do, not just something you should do.**

Change is usually hard, however much you may personally think it is the correct thing to do. Your colleagues will not work differently unless they connect to the reasons for the change (that make sense to *them*).

- How concrete and clear is your organisation’s purpose to all your colleagues? Explore ways you could help everyone become clear what positive change your charity is aiming to achieve?
- Find ways to continually reinforce why this purpose matters. For example, create regular story-sharing opportunities (for example, in all team meetings).
- Create and promote regular opportunities for interaction between fundraisers and those on the front line so that everyone feels close to the mission. Unless you model

that these project visits / meetings are important, some people rarely ‘get round to’ using them, so show that connecting to the mission is an important part of everyone’s job. This is not just applicable for certain roles. Sara Whiting and her colleagues at Hope and Homes for Children made a point of enabling receptionists to go and visit the work of the charity (which required travel to orphanages in Eastern Europe), because they are just as important (perhaps more) in shaping donor’s experiences than those whom most charities prioritise for such trips.

**b) Your definition of success - define and reinforce what success looks like in terms of your supporter’s experience or relationship with your charity.**

Assuming your colleagues feel motivation to do things differently, we should not further assume they know what it is that we want them to do. What are we all aiming to achieve when we interact with our supporters? Help your colleagues understand completely clearly what great donor-centred fundraising looks like. Unless they know what success looks like, they are likely to focus on something else, like securing a donation, as the sole objective.

- Define what success looks like very clearly in terms of the way your supporters experience or build relationships with your charity. What do you want everyone in your charity to aim for?
- Ask ‘how can we engage our supporters better? What does that look like and sound like?’ Ask ‘If we knew it was possible to achieve this kind of success in engaging supporters, what would we do differently?’
- These actions can only really work if they become important beyond the fundraising teams. Deliberately involve people from across the organisation, listen to their point of view and help them see the benefit of donor-focussed fundraising to their objectives.
- Make sure that this focus on success in terms of the donor experience is reflected in everyone’s objectives, both team and individual.
- Make sure that the donor experience is regularly reported on, and that team meetings are used to discuss the findings, celebrate success and to seek ongoing improvement.
- Find ways to reinforce your vision for the supporter experience, for example by regularly asking supporters what they think, sharing supporter’s tweets and letters with all teams, or organising a cross-departmental thank-athon.

People – Build great relationships

**a) Inside-out leadership – change yourself first**

Leadership coach Penny Ferguson advises that great leaders act in such a way that those around them act as leaders able to think for themselves. It is very tempting for a leader to play the role of the expert, always providing others with the answers. Though it rewards your ego, this behaviour increases everyone’s stress because it inadvertently causes your colleagues to use their initiative less and depend on you more.

- Acknowledge that the signals we send others in every interaction affect how they think and feel about their own abilities. At its simplest, resist the temptation to do most of the talking. Deliberately ask other people what they think, and do it often. Initially, they may not realise they have answers, but the more you practice this coaching style of leadership, above all with the belief that others are capable of leading themselves, their confidence and thinking skills will improve.

#### **b) Trust - give time to your relationships**

To succeed, any strategy depends on all the people who are going to implement it. All too often, leaders do not spend enough time building healthy relationships with the people in their teams. As a result, people do not trust you or feel trusted by you, and so they fail to implement the strategy with complete conviction.

- Acknowledge that genuine trust makes all the difference to how people behave, and so none of the other strategies will work in the long-term unless you build strong relationships as the foundation. This is of course true of your relationships with donors, but as a leader your first job is to help your colleagues succeed, and that usually means focusing more on your internal relationships.
- Give more time to internal relationships. At its simplest, spend half an hour with each of the people you manage every single week. Who else in the organisation should you regularly spend time with, especially those in non-fundraising teams? To create trust in all parts of the culture, which trustees, supporters and volunteers should you develop strong relationships with?

Culture – Create an adaptable, empowered environment

#### **a) Shared consciousness – encourage people to think in terms of the overall goal, not artificial silos, and encourage information to be shared across the organisation**

Because any supporter who cares about your mission may be able to help in many different ways (e.g. with a donation, by campaigning, or through their company) it is essential that all your colleagues know what each other is trying to achieve. This makes it possible that in any interaction you are equipped to help the supporter contribute to the mission through the most appropriate way. This will only be possible if you promote a culture in which people share information and care about each other's objectives.

- As often as you can, do activities that mix people up to build trust and smash silo-thinking. Team away days, department days, joint projects are all an opportunity to reinforce the ethos of working towards the common vision.
- Create project groups where the whole group works to a common goal and shares responsibility for the goals that under-pin that.
- Give responsibility to those who display these 'shared consciousness' behaviours.

- Model this intra-team ethos with other leaders, always taking an interest in and supporting other teams' projects and objectives.

**b) Devolved responsibility – empower everyone to think for themselves and take action**

Due to technical and social changes in the last decade, our supporters now share and react to information more quickly than ever before. If our charities are to keep up with their needs and expectations, everyone in our charity needs to be able to use their initiative. The traditional 'chess-master' style of leadership inadvertently makes people over-cautious and disempowered. Slow sign-off procedures may feel safer but they are the enemy of donor-centred fundraising.

- Listen and often ask people what they think, so that you empower everyone to take responsibility.
- Constantly reinforce the notion of taking action as an important value and model this. Ask people how you can support them to make this happen, so that you identify and if necessary help solve what is holding them back.
- Explore ways to make your sign-off procedures far simpler. For example, Joe Jenkins described a values-based approach to sign off, in which the project manager is empowered to use their common sense to involve the appropriate people.

**c) Growth mind-set – model and promote the value of ongoing learning and development**

One of the few things we can be sure of is that the environment in which charities operate will continue to change. Indeed, at the present rate, this change seems likely to keep speeding up. As was highlighted in the *Great Fundraising* research, if your charity is to repeatedly adapt to what your supporters need, you must create a culture where continual learning is normal.

- Promote a learning environment by investing in learning and development. See it as 'investment' rather than 'spending' because it helps improve the donor experience, and in turn, income.
- As a manager, make time for regular conversations about learning and development during one to one meetings with colleagues.
- Model and encourage a culture which encourages the willingness to evaluate what is working and what is not, and to learn from both. Ask 'what can we learn from this?' and show you are serious about the honest search for answers and solutions rather than placing blame. As *Black box thinking* by Matthew Syed explains, whereas in many fields people are reluctant to deal objectively with the issues when things gone wrong, the reason the airline industry has made such huge progress in safety over the decades is its willingness to seek to learn from mistakes.

- Clearly investing in courses and conferences is valuable, but even if your budgets are limited, there are still many other affordable practices that make a big difference to your culture. Here are six inexpensive but powerful tactics:
  - Encourage and help people find mentors with whom they can regularly discuss work and development issues. They don't need to wait for a formal mentoring system - encourage them to arrange something informally through colleagues and people in their network.
  - Create a book club for sharing ideas from work-related books. Richard Turner used this to great effect at Solar Aid.
  - Promote volunteer-organised groups such as IOF Special Interest Groups, which hold inexpensive events and provide on-line ways to connect and solve common problems
  - Read and share helpful blogs; encourage others to do the same.
  - As Liz Tait from Battersea Cats and Dogs Home suggests, during team meetings and away days, make time to include team building activities, rather than only discussing tasks and strategies.
  - Encourage everyone to make a development plan to share with their manager. As Liz points out, it can be an incredibly simple document, but the fact that it exists helps you and your manager to value and encourage personal development, and the many ways it benefits the fundraiser, the manager and the donor's experience.

## The Approach

We were clear from the start that this project was not just about leadership and not just about donor-centred fundraising. (We found many people who wanted to give us their opinions on one or the other of these topics!) Critically, we were keen to find the sweet spot where the two intersected. We were seeking to answer the question: ‘What kind of leadership have you found increases the chances that a charity will operate in a donor-centred way?’

Most people in fundraising leadership positions have already shown themselves to be competent at fundraising. The major challenge is that as a leader, the problems you need to solve are less about creating great relationships with your own donors and more about increasing the chances that others will also do create those relationships.

Whatever the size or type of your organisation, the challenge of creating an environment in which other people do more of the right thing is fairly simple in theory, but is often not easy in practice. Furthermore, many of the challenges that feel like barriers to donor-centred fundraising are so common that some people genuinely believe that’s just the way things are.

We are talking about exasperating things like missed opportunities for your project because your colleague was not aware of something relevant to a particular donor, arguments about whose target should receive credit or slow-moving sign-off processes in larger charities. If you have suffered these issues in every role you have had before becoming a leader, it is understandable that you might not quite believe it is possible to solve them.

When life is stressful, it is not surprising that you might be drawn to spend more time where you are comfortable, thinking and acting like a fundraiser, and less time in unfamiliar territory, thinking and acting like a leader.

The exciting news, though, is that donor-focussed leadership is a skill like any other. The more you focus on it and work at it, the better you will become. Even if you are determined to overcome the other challenges and build this skill, there still remains a challenge. What should you focus on doing better? There are thousands of leadership and fundraising books out there and plenty of people who want to give you their advice. Without a clear sense of some key principles to focus on, it is even less likely that aspiring leaders will follow through and improve.

The three people involved in this project (Rob Woods, Charlotte White and Kim van Niekerk) are all former fundraisers based in the UK who have worked in the charity sector for more than ten years. They all now operate as consultants; this work includes both training groups and one to one coaching with fundraisers and leaders. Every year, they each work with leaders from dozens of different charities, of every size and type.

To answer our key question, we each tried to think of anyone we had ever heard of who had a strong reputation as a fundraising leader and who worked or had worked in an organisation that had been donor-centred in its approach to fundraising. We also each asked other experienced fundraisers if they could think of anyone who met both criteria.

We conducted interviews with 15 leaders, asking them questions based around the starting question: ‘What kind of leadership have you found increases the chances that a charity will operate in a donor-centred way?’ Three different people recommended Joe Jenkins, who had been the Director of Fundraising and Supporter Engagement at Friends of the Earth, and was now at Children’s Society as worth interviewing. We invited him to share his experiences on

the subject of leadership, culture and mindset at a breakfast event we held for 36 Directors of Fundraising in September 2016.

Based on what the 16 leaders said, the project lead searched for the key leadership themes that seemed most credibly to have helped charities to operate in a donor-centred way. He also searched other books and training courses, including those that explored ideas about successful leadership in other contexts, which faced issues which donor-focussed fundraising leaders would recognise. He used this information to create a model of three key principles that help people succeed in this kind of leadership.

## Introduction

‘It’s about giving and engaging people, it’s this lovely virtuous cycle where you get to give money, and you get to do something yourself that actually makes a difference.’

Gemma Sherrington, Innovation Director, Save the Children

‘I wish I’d thought of that’ is a fantastic annual event in which you hear 20 examples of things charities have done to inspire their supporters and make a difference. In 2014, Gemma Sherrington from Save the Children shared the example of Friends of the Earth’s Bee Campaign. She began speaking not as a fundraiser, but from the point of view of someone who cares about bees. She talked nostalgically about childhood summers in the garden and how bees were a fundamental part of that beautiful environment.

She described how she had noticed bee numbers declining, and yet no one seemed to be doing anything about the problem.

In particular, Gemma talked about how great the Bee Campaign made her feel. ‘It actually felt like not just giving but actually being the heroes and making a difference...and that felt great’.

It addressed something she cared about, and not only because of how fun and playful the tone of the campaign was, but in particular because in addition to making a donation to help plant a wildflower meadow which would help protect bees, it enabled her to do something herself – plant her own flowers.

Gemma is not the only one with whom the campaign successfully connected. It was unequivocally a success in fundraising terms. In the launch year, it smashed all its fundraising targets. For example, within a year, it had generated over 40,000 new cash supporters, 12,000 prospective donors and over 3,500 new committed givers. Joe Jenkins stated that the campaign turned around the long-term decline in the supporter base, and its positive effects continue to be felt.

Importantly, it generated some of the charity’s highest-ever campaigning response rates (one in four people contacted took action, and for existing supporters, one in three took action). Tellingly, it led to 350 people creating and sharing their own content about bees.

Most important of all, it achieved its primary policy and campaigning objective, in that the UK government has now committed to and publicly launched a National Pollinator Strategy to protect bees.

We believe we are right to be impressed by what Friends of the Earth achieved, but rather than see it as a brilliant idea, as in ‘I wish I’d thought of that’, the heart of its success is that

in fact it's the sum of dozens of ideas within the charity, and indeed hundreds of ideas from outside the charity.

At least 350 people had their own bee-campaign related ideas, and got on and wrote and published them. In fundraising teams, Joe found that members of the public were coming up with all kinds of ideas that he and his colleagues would not have thought of.

He explains that 'in the old charity model, what happens is we get stuff from some people to help out some other people...the shift we need to make is to realise that here are some problems we're trying to solve, and there are supporters who can help solve them...and there isn't an artificial barrier...it's a collective endeavour and if you think of that as one bubble, one collective community, you start to see things differently.'

As a charity professional looking at the Bee Campaign, a valuable start is to appreciate the size of the achievement. The most useful question is not 'how could I think of something like that?' Ask 'how could we as leaders help *create an environment* which would enable other people to do something like that?'

Doing what Friends of the Earth has done is possible, but it's not common practice

'The leaders who succeed in today's world are not so much chess masters as gardeners. They nurture and empower, creating the thriving environment in which their people can do what is needed to achieve the mission'.

Joe Jenkins, Director of Fundraising and Supporter Engagement, The Children's Society

In order to create the environment that enabled so many people to not only have their own ideas but also act on them, Joe cultivated a particular style of leadership.

This started with an understanding of what sort of leadership is most likely to create the kind of environment that will help charities succeed at this point in the twenty first century. He believes that to create this environment you cannot play the role of the all-knowing, all-powerful chess-master, planning things in advance, in control of all the pieces and making one move at a time.

As General Stanley McChrystal writes in *Team of teams* 'people are more connected, more mobile, and move faster than ever before'. Joe's view on how to respond to this complexity is that our organisation must become more adaptable, more agile and more empowered. To achieve this requires leaders who are not so much chess masters as gardeners.

We have observed many successful fundraising leaders, including Joe Jenkins, direct their energy at three areas in particular to increase the chances that their colleagues (and their supporters) will feel empowered to adapt and take action. This paper shares examples of how leaders from a range of organisations have helped make this happen.

### Define and champion what success looks like, and why it matters

'You need to develop that sense of shared consciousness...so we all know what the picture is, what we're striving collectively to do and we've got permission to get on and do it.'

Joe Jenkins, Director of Fundraising and Supporter Engagement, The Children's Society and formerly Friends of the Earth

## Help people see beyond the limits of their own job

When Dr David Feinberg became CEO of the UCLA Health System, the organisation was facing a tough challenge. Though it had a very strong track record for the quality of the surgery people received, too many patients were unhappy with their experience of the hospital. In fact, two out of three patients said they would not recommend the hospital to others, and the hospital languished at very low rankings in the various other measures of patient satisfaction.

Dr Feinberg wanted to find out what was going on, so one of his first moves was to ask the patients how they felt about their experience at the hospital. He and his colleagues did this in as many ways as possible. They interviewed one lady who had had a very traumatic experience at the hospital, including receiving surgery for a part of her body which was in fact healthy and should not have been touched. To cap it all, when the time came to go home, she realised she would need a taxi.

She discovered she was short on cash, but when she asked for a voucher from the receptionist to cover the taxi she needed to get home, she was told that according to the hospital rules, she did not qualify for the taxi voucher scheme. As a result, she took a taxi as far as the change in her purse would allow and then painfully struggled the remaining miles to her home on foot.

This upsetting example brought home to Dr Feinberg what was going wrong. Most staff were doing just what they viewed as their bit of the job. Though the receptionist's behaviour is inhumane from the reader's point of view, as the receptionist dealt with the many elements of her busy job, she probably reasoned that all she could do was her job. That, concluded Dr Feinberg, was the problem: far too many people were just doing their jobs. Everyone was so focussed on what they thought their roles were that they did not realise that every time they interacted with a patient, they were in fact the 'keeper of the flame' for the entire hospital.

The UCLA health care system is a vast organisation, including over 50,000 doctors and nurses, let alone numerous other roles, and is split across several sites. The vast majority were good people, working very hard in a complex environment in spite of numerous challenges.

How did the leaders help everyone feel they had to do things differently?

They created opportunities for the staff to meet patients like the woman we mentioned earlier and hear what had gone wrong and what impact that had had. In so doing, they helped everyone to not only understand the mistakes, but also to own and learn from them. The result was that everyone started to feel that they had messed up if a patient was not taken care of in any part of the system.

Another challenge was that with so many different, specialist roles in the massive workforce, Feinberg and his team needed a way to help people work out what they should do, no matter the situation. The solution was the motto 'how would I treat this patient if they were my own mother?'. Furthermore, Dr Feinberg repeatedly stated that this meant that if in doubt, you should 'make the decision. Do what's right.' So when certain doctors came up with excuses, the nurses would now be fully supported if they challenged them: 'I can see this is a difficult situation, but as it stands my mother wouldn't appreciate the solution you propose'.

Within a few years, the culture in terms of the patient's experience at UCLA Health Care System changed completely, and this shift made a demonstrable difference in their measurable results. For example, the average waiting time in the Emergencies department

was slashed from over three hours to just 18 minutes; and in terms of patient satisfaction the Centre has become one of the highest-performing hospitals in the US.

As outlined in *Prescription for Excellence*, the platform which made this extraordinary change possible was initially built from two building blocks: firstly, ensuring that everyone truly felt the need for the change, by focussing on their reasons why; and secondly making it simple and clear what success would look like. ‘*How would I treat this person if they were my mother?*’; ‘*If in doubt, make the decision. Do what’s right.*’

Your organisation’s purpose – focus attention on why changing the way you work with supporters is something you must do, not just something you should do

In his excellent book *Start with Why*, Simon Sinek demonstrates that making your underlying purpose very clear makes a huge difference to your chance of success. He explains that the major thing that Apple, Martin Luther King and The Wright Brothers had in common was their relentless focus on their underlying purpose. He shows that others who achieved less success in their respective fields had focussed most of their energy on ‘the how’ rather than ‘the why’.

In fact, during one early interview, Steve Jobs was asked why he thought he had already achieved more than most business people much older than him. He answered that he truly believed that everything around us was not created by people who were smarter or more talented, but rather by people who were clearer on their purpose than the rest.

The reason it is so important to focus attention on your purpose is that if you don’t, you and your colleagues will not find the energy and drive to consistently work to the best of your ability. When you are focussed on something that really matters to you, you find a way to solve problems and keep persevering in a way that otherwise does not happen.

As a leader, there are three key elements to harnessing the power of your purpose.

- a) You must find your reason why change must occur.
- b) You must help others find their reasons why (which may be different to yours).
- c) You must create an environment in which this sense of purpose is continually reinforced.

Louise McCathie, Director of Fundraising at Birmingham Children’s Hospital, explained that the vision for fundraising at her charity stemmed in part from her own disappointment at what the charity was then able to do for the families using the hospital. As she looked around, the fundraising level was way below what she felt the patients and their families deserved. For example, ‘if you turned left as you entered the hospital you could get an experience that was completely different compared to if you turned right. It was unacceptable that some children would have to wait years for the department they were treated in to receive the improvements that fundraising could bring...’

Sara Whiting, Director of Fundraising at Hope and Homes for Children, explained that for her, both as a fundraiser and as a leader, everything starts with knowing why you are here working for this charity. At Hope and Homes for Children, the organisation’s senior leadership team have clearly answered this question. Their stated purpose, which affects the way everything is done, is ‘to catalyse the eradication of institutional care of children globally.’

Wise leaders recognise that this clearly defined purpose is a powerful start, but it is not enough. They recognise the need to create an environment that continually reinforces the charity's purpose in as many tangible ways as possible. There are several ways to achieve this goal. The most fundamental is to give fundraising colleagues as much access to the work on the frontline as possible. Another powerful tactic is to promote rituals that ensure people regularly share stories about the work of the charity.

Sara Whiting described one technique that is less common, but which is so helpful to prime her daily focus that she does it every day. In the morning before she starts work, she writes on her notepad that 'today is for...Agnella'. The name she is dedicating her work to might change from day to day, but she has found that taking a moment to remember a particular child she has met through her work for Hope and Homes for Children has a powerful effect on her day.

Your definition of success – define and reinforce what success looks like in terms of your supporter's experience.

Susan Foster, Fundraising Director at National Trust, suggested that leadership is largely about having 'a clear vision of where you want to get to and inspiring others to work towards achieving that vision'. Fundamentally, the leader must make clear to everybody what we are all trying to accomplish. Martin Edwards, CEO, Julia's House Charity agreed, saying that all leaders, including the chief executive, need to make clear what success looks like, what standards are expected in terms of how donors are listened to and respected. Importantly, we need to help people understand that the pursuit of this standard is ongoing, rather than a one-off target that will come and go.

What does success look like for the supporter relationship with *your charity*?

Joe Jenkins explained that while at Friends of the Earth, he and his colleagues decided they needed to put their supporters at the heart of everything they were doing. Rather than focus their energy primarily on strategy or processes, the way to achieve this was to work on culture and mindset. He views his role of leader as encouraging and promoting a mindset and culture that was focussed on supporters at the heart of everything.

'We were obsessed with the question 'how do we change the experience that our supporters have of Friends of the Earth, so that we can have more of an impact on the environmental problems people are concerned about?'

Joe advised that you should 'be clear what that direction of travel is. Not all the detail, not all planned out, and not presenting yourself as having all the answers...it's about being clear which way you're trying to head, rooting that in the values of the organisation, and then empowering others to make it happen.'

Giles Pegram, former Director of Fundraising at NSPCC, helped his colleagues to focus their attention on the vision of Donor +, which was for supporters to have an experience which was 'different, better, more rewarding' than they would receive at any other organisation. This did not languish in a strategy document somewhere; it was used again and again as people discussed their work.

Richard Turner, former Director of Fundraising at Solar Aid, helped his organisation clarify that the means to generate sufficient resources to achieve their Big Hairy Audacious Goal was to 'inspire people to spread our stories'.

Help your colleagues embrace the vision in terms that make sense to them

Although Dr Feinberg took great care to make his organisation's goal real in the day-to-day with the tangible, emotive question 'how would I treat this patient if they were my own mother?', he understood that this was not enough. He had to first help everyone become truly vested in wanting to make this shift. He helped them feel the uncomfortable truth that the status quo was unacceptable.

Joe Jenkins advised, 'Firstly, be clear at all times why carrying on with what your organisation has been doing is not going to get the results you need...you have got to have that reference of why we need to do something else, otherwise its human nature that everyone will default to doing the same things'.

Richard Spencer, who led the Growing Support Programme at RSPB, recognised that achieving change in a complex organisation is rarely easy unless there is a sense of urgency. According to Spencer, you have to focus people's attention on what is absolutely unacceptable, 'the burning platform'.

He needed to reach consensus on investing in technology that would provide a single view of all the information about each supporter, and like Dr Feinberg, an important tactic was to share stories.

One example he shared was the case of a couple who had cancelled their membership because the husband was no longer physically able to visit RSPB sites. Without the single supporter view, the individual giving team was unaware that the couple were still very generous, active supporters, holding a garden party every year and raising significant income. Given that the couple were still dedicated supporters of RSPB, they had been understandably upset to be approached by the charity and invited to reactivate their membership.

### Relentlessly reinforce the vision

Richard Spencer explained that one way he helped put the point of view of the supporter at the forefront of people's minds was by circulating a weekly results update. At the top of the update, he always included 'snippets', which were verbatim quotes that had been received from supporters that week about why they supported RSPB and things that they felt we were doing well. These 'donor voices' came from any communication the charity had had with supporters, be it email, letters, phone calls or meetings.

One reason Richard had a strong sense that this tactic was helping to create a more donor-focused culture was that fairly often, colleagues who had not been on the circulation list for the updates would ask to be added. He had never known this to happen in relation to any other email update list.

### Make it visible

Louise McCathie saw her leadership role in terms of influencing not only her fundraising colleagues, but the whole hospital. This included those colleagues in nursing and estates and all the other roles that come in contact with thousands of patients and their families every year. How could she help them understand that fundraising is a positive thing that creates good, healthy experiences for patients and families? A key realization she had was that if this shift were to happen throughout the hospital, the benefits of fundraising needed to be far more visible.

To do this, she encouraged her team to look for small, relatively easy victories first, then use them to build momentum. The Donations Office was hidden deep in a far-flung corner of the hospital. Partly because it was so hard to find, it received only 40 visits per week. Louise knew she needed a more visible, physical presence, and secured permission for a temporary, pop-up Christmas merchandise/fundraising shop along a main corridor of the hospital. This was so successful that she was able to make a strong pitch that it should be permanently used for fundraising.

Like Dr Feinberg, Louise also understood that language matters. She and her team used language and branding to convey that doing fundraising was easy and fun. The new space near the entrance would now not be called the drab, confusing Donations Office, but instead, the Fundraising Hub. It offers fundraising advice – helping people enjoy and succeed at their fundraising - as well as selling merchandise. The old Donations Office had received 40 visitors per week. The new Hub received a staggering 29,000 visitors, in its first year and this figure has continued to grow. Most importantly, Louise had created a highly visible symbol of what fundraising engagement could be, at the heart of hospital life.

Vision - Ideas to help you define and champion what success looks like, and why it matters.

- 1) How concrete and clear is your organisation's purpose? Could you work with your colleagues to make it more clear what your charity is aiming for? Importantly, it does not necessarily need to seem easily achievable, in fact, as Solar Aid and many other examples show, it's probably more likely to galvanise support and action if it doesn't.
- 2) Define success in terms of the way your supporters experience or build relationships with your charity. What do you want everyone in your charity to aim for?
- 3) Acknowledge that you don't know all the answers, and involve people from every part of the charity. Involve people from across the organisation and search for their answers to the question, 'How can we engage our supporters better? What does that look like and sound like? If we knew it was possible to achieve this kind of success in engaging supporters, what would we do differently?'
- 4) Find ways to continually reinforce both your reasons why this matters, with regular story-sharing opportunities (for example in all team meetings), and interaction between fundraisers and those at the front line of your charities work.
- 5) Find ways to reinforce your vision for the supporter experience, for example, by regularly asking supporters what they think; sharing supporter's tweets and letters with all teams; organising a cross-departmental thank-athon.

## 2) People – build great relationships

Leadership is a potent combination of strategy and character. But if you must be without one, be without the strategy.

Norman Schwarzkopf

When we asked Liz Tait, Director of Fundraising at Battersea Dogs and Cats Home, what kind of leadership is most likely to create a great experience for donors, she paused for a moment. Then she stated with complete conviction:

‘You have to be passionate about your people’. When we asked what she meant, she explained she has adopted the philosophy of one of her early mentors, who told her that ‘there wasn’t a member of my team that I wouldn’t die in a ditch for’.

She explained that for her, leadership in fundraising is about caring about the people you work with. ‘You have to treat everyone with respect and compassion at every level...and you have to recruit other people who will do the same.’

She said it starts with recruitment, and goes on to how you invest in and support their development. She stressed the importance of really high standards when recruiting: ‘I look out for people that really have an appetite to deliver something special for this charity...and I look for other managers who are passionate about, who care deeply about their people.’

This is consistent with the findings of *Great Fundraising*, a year-long study of what factors lead to outstanding fundraising. The authors stated, ‘great leaders allocate a substantive proportion of their time to appointing or developing exceptional teams...’

When we asked Liz which group received more of her energy and focus, supporters or her internal colleagues, she said that it was her people. She said that she cared deeply about her supporters too, but that for her, her colleagues came first.

Donor-focussed fundraising requires a leader to care deeply about the mission of creating outstanding experiences and relationships with supporters. Providing those experiences must remain the target, the definition of what success looks like. The fascinating challenge is that if you are to achieve it, it must be achieved through your people.

In theory, solving this challenge is simple, but we have observed that in practice it is not always easy. Most fundraising leaders are, at heart, great fundraisers who have succeeded in their early roles because they prioritize the donor when deciding how to spend their time. As a leader, it can be very tempting to spend your much of your time and energy here. One leader we interviewed told me her biggest challenge is that because she spends so much time with supporters and donors, she often feels she has not spent enough time with her colleagues.

What is smart about Liz’s strategy of putting colleagues first is that the more valued your people feel, the greater the level of trust they have in you, the more likely they are to go the extra mile to make their supporters feel the same way. Put simply, people-focussed leadership makes for donor-focussed fundraising.

Last December, one of us went to John Lewis for some Christmas shopping, which involved going to several different departments. On three different occasions, the staff went out of their way to help find solutions in ways that we had not asked for or even known to ask for. What do you think John Lewis leaders need to do to create an environment in which everyone consistently displays this ‘going the extra mile’ behaviour?

We believe that sharing a common vision for what success looks like and creating a shared consciousness so that everyone is empowered are both important elements of their culture. Even if you have these two things, though, if people don’t feel their leaders care, it still won’t work. For John Lewis staff to act so consistently in this way, they must feel that their leaders genuinely care about them, so that, as Simon Sinek says in *Leaders Eat Last*, they feel safe enough to take risks.

This is more about integrity than strategy, but when you think about it, Liz’s attitude to her people does absolutely drive great experiences for the supporters of her charity. When you

feel your leaders go the extra mile for you, it's far more likely you will go the extra mile for the donors you serve.

Of all the ingredients to create great leadership practice, this one sounds the simplest. Care about your people and spend time and attention developing those relationships. In practice, however, it is not always easy, and so being honest with yourself and seeking feedback from others can only help.

In *Leadership Plain and Simple*, Steve Radcliffe asserts that incredibly often, the leaders he coaches have 'done a great job on vision, strategy, budgets or plans', but they aren't getting results because people aren't engaged. What's missing is so clear – they haven't got relationships big enough for people to be engaged...'

He goes on to write that 'leadership is about what you're like and how you come across, not what techniques you've got to bring to the party or what processes you want to put in place'. As Di Flatt, Chief Executive of Sweet Pea Charity and Greenhouse Fundraising observed, 'how you come across' usually improves when you're willing to be more vulnerable and real in how you appear to your team.

When we asked Lisa Robinson, Corporate Fundraising Manager at The Children's Society, whether she felt the environment was any different since Joe Jenkins had joined, she explained a number of ways he has helped people buy in to a new approach to building relationships with supporters. When we asked why the change seemed to be taking place, one of the first things she told me about was Joe's manner. She said 'when you talk to him, he always responds in an honest, considered, credible way. He *does* really listen. He lets you know his door is open if you want to come and discuss anything. He says that, and you know that he really means it.'

#### Inside-out leadership - change yourself first

One of us once attended an outstanding training programme given by leadership expert Penny Ferguson. On Day 1, she listened to the way we interacted in a group discussion and then demonstrated how every one of us, even the most experienced managers, were making inadvertent mistakes in how we interacted with others. We also learned that with some small tweaks to the way you communicate, coupled with a switch in focus from managing to leading, you can make a big difference in how your colleagues feel about their own abilities.

One of the concepts Penny helps people learn is *Inside-Out Leadership*. There is a gap of at least two weeks between the sessions. When people come back for the final day of the course, they talk about what has changed for them. In describing their new mindset, common answers are 'more open, more tolerant, appreciative, receptive and authentic'. In terms of what they've been doing differently, their answers include 'truly listening, keeping my mouth shut and asking for their ideas, asking questions to get others to take responsibility'.

Participants are asked what results they have had in the last two weeks. When the group reported the results since we had shifted our mind-set, every single person described external effects, such as 'improved motivation from my team', 'everyone's been more proactive' and 'improved relationships in the team'.

As we sat and listened to everyone else's improvements in both relationships and results, we realised that though our colleagues had been operating at a higher and more productive level, none of us had told our colleagues to behave differently. What we had done was focus on

changing ourselves, and in doing so people and relationships had changed around us. At this point, we properly understood what Penny meant about great leadership being inside-out. As Penny summarises:

It is not about changing others – it is about changing self.

We have found that most managers set about trying to improve their team's performance by trying to better manage people's behaviours, but what a great leader does is to start with themselves. They understand that the decision to trust, believe in and empower results in subtle but powerful differences in the signals you send. These shifts lead to results on the outside - your team developing greater confidence to think for themselves and proactively do the right thing.

Leadership is not so much about technique and methods as it is about opening the heart. Leadership is about inspiration – of oneself and of others. Great leadership is about human experiences, not processes. Leadership is not a formula or a program, it is a human activity that comes from the heart and considers the hearts of others.

It is an attitude, not a routine.

Lance Secretan, Industry Week, 10 December 1998.

### Trust - give time to your relationships

Richard Turner said that one of the most powerful shifts he has ever made as a leader was deciding to spend time every week with the people he manages. He acknowledges that there is nothing so astonishing about this, but given that there will always be so many other demands on your time, some of which could appear more important, there is a world of difference between agreeing that the habit makes sense and actually doing it.

As a leader at Solar Aid, every week Richard sat down for 30 minutes with each person he managed. The format may have changed a little from week to week, but the default plan was to spend ten minutes listening to what the other person wanted to talk to him about, ten minutes talking about what Richard would like to catch up on, and, whenever possible, ten minutes discussing his colleagues' development.

Richard said, 'I was amazed at how amazing it was'.

It had such a powerful effect at Solar Aid because in addition to increasing the flow of information, which helps create a shared consciousness, above all this leadership habit helps build robust, trusting relationships.

Liz Tait extends this principle beyond her immediate team. She has made it her habit to spend at least half an hour with every member of her department, every year. (Note that there are 44 people in her department.)

When they meet, she asks them questions such as: 'if you could change anything about where you work, what would you change?'; 'if you were the Fundraising Director, what would you do differently?' She comes out of these meetings with reams of notes and lots of potential actions. While she can't act on every idea she receives, over the years this habit, in addition to building trust, has enabled her to spot patterns that have enabled her and the team to improve the way things are done for both colleagues and donors.

When we asked Liz how she manages to follow through on her philosophy, even on a difficult day, she said that though she does not always succeed, she always comes back to this practice as her intention.

### The risk of promoting efficiency ahead of relationships

‘They keep saying the people in fundraising are apathetic and have no drive. The sad thing is it’s become a self-fulfilling prophecy, because now some of them *are* even wasting time on Facebook and seem to have lost their energy. People aren’t taking risks because they see others getting into trouble and so they just keep their heads down.’ This is what a fundraising manager told one of us in 2012, as morale in her organisation had sunk to an all-time low, with fundraising results equally worrying.

She said that the more the leaders became worried about results, the more they presumed this was due to mistakes and lack of efficiency and hard work on the part of individual fundraisers and team leaders. As a result, they created more and more systems to measure financial performance (all of which required fundraisers to stop focussing on supporters in order to provide the information) and far more robust procedures for signing off decisions.

They had presumed that the more you check up on people and make intelligent decisions on their behalf, the fewer mistakes they’ll make. The unfortunate consequence was that everyone was scared of messing up and no one felt trusted to use their initiative.

This graph shows the nature of all the emails which were received by the group ‘All Fundraising Managers’ during one four-month period in 2012.

Figure 1. Emails received by All Fundraising Managers group.



None of the emails in this four-month period contained guidance, stories or encouragement about achieving great donor relationships.

From this graph alone, it is not hard to imagine how most of those managers would feel, and therefore the signals they would be likely to send their own teams. It is hardly surprising that most staff took fewer risks and focussed more on money than donor relationships. You can imagine the impact this had on many of the interactions they had with donors.

Apparently, the Chief Executive and many of the senior leadership team did also occasionally talk about how important it was for fundraisers to work hard at building relationships with donors, but you can tell just by the content of their emails to the leaders of fundraising teams what was actually more important to them.

The unintended result was an environment in which people did not feel trusted to take action. In fact, the ones we spoke to had far more colourful ways of describing their feelings about the senior leaders than simply 'they don't trust us'. It is not surprising that donor experiences suffered, that many people chose to leave and that the charity found it extremely difficult to recruit.

In contrast, Liz Tait told me that she recently heard of a volunteer who had spent nearly two hours speaking on the phone to one of their charities' supporters, an elderly lady who lives on her own. Viewed through the prism of efficiency, such behaviour may sound contrary to the interests of the organisation, but if we are striving to go the extra mile to show that we truly care about donors, like the behaviour of the sales assistants at John Lewis, it makes sense. To feel safe that such interactions are the right thing to do, that volunteer or staff member needs to feel safe using her initiative.

### People - Ideas and actions to help you build great relationships

- 1) Acknowledge that the signals we send others in every interaction make a difference to how they think and feel about their own abilities. At its simplest, resist the temptation to do most of the talking. Deliberately ask other people about what they think. Initially, they may not always realise they have answers, but the more you practice this coaching style of leadership, above all with the belief that others are capable of leading themselves, it will become a self-fulfilling prophesy.
- 2) Acknowledge that genuine trust makes all the difference to how people behave, and so none of the other strategies will work in the long term unless you build strong relationships as the foundation. This is of course true of your relationships with donors, but as a leader your first job is to help your colleagues succeed, and that usually means focusing more on your internal relationships.
- 3) Give more time to internal relationships. At its simplest, this can mean spending half an hour with each of the people you manage every single week. Who else in the organisation should you regularly spend time with, especially those in non-fundraising teams? To create trust in all parts of the culture, which trustees, supporters and volunteers should you develop strong relationships with?

## Culture - create an adaptable, empowered environment

‘For a culture of team of teams, rather than a traditional command structure to succeed, requires a different kind of leader. ...the heroic ‘hands-on’ leader whose personal competence and force of will dominated battlefields and boardrooms for generations has been overwhelmed by accelerating speed, swelling complexity, and interdependence. Even the most successful of today’s leaders appear uneasy in the saddle, all too aware that their ability to understand and control is a chimera. We have to begin leading differently.’

General Stanley McChrystal

‘He really wants to know what you think...so your brain is always searching for more and more ideas...and when you or someone in the team come up with different things he’s so genuinely enthusiastic...so pretty soon that’s the way you think even when he’s not there.’

Jamie McCloskey, Programme Partnerships Manager, Solar Aid

### Eradicating the kerosene lamp from Africa

Until 2009, Solar Aid’s strategy had been to help people in the developing world to solve problems through several different solar-powered products.

A major turning point came when their leaders decided to focus their efforts on solving one challenge in particular: the fact that the most common source of light in the evening for many people was the kerosene lamp. Not only is kerosene expensive, limiting how much the lamps can be used, it is also dangerous because it is highly flammable and, since it is colourless, it is sometimes mistaken for drinking water. The mission that Solar Aid settled its efforts on was now ‘to eradicate the kerosene lamp from Africa’.

Though there were organisational challenges to changing their strategy, it also brought huge benefits. In particular, defining the enemy (the kerosene lamp) in their mission and keeping it tangible and focussed made it far easier to create a shared consciousness, both internally and externally.

This clarity about the mission made it ever more clear to Richard Turner, former Director of Fundraising at Solar Aid, that ‘the old ways of fundraising were not working...so then we had to search for a different way of doing things’.

### How will we achieve our mission?

The key question which Richard encouraged his colleagues to focus on was ‘how do we inspire people to spread our story?’ This was quite a shift from ‘how do we get people to give us money?’ He repeatedly stated this as the right direction of travel, initially within his team and subsequently with all his colleagues in the whole organisation.

This clarity about how they were most likely to achieve their vision increased the chances that everyone would make decisions that led efforts in the right direction. For example, when presented with the opportunity for Solar Aid to attend a music festival, they realised that the answer had to be ‘yes’, because even though they might only raise some coins through bucket collections, the event was ideal to help spread their compelling story.

They took some solar lights (their safe, cheap solution to the kerosene lamp problem) to the festival and had lots of conversations. One of them was with a former Solar Aid volunteer who was interested to hear about the new mission. One month later she got in touch, saying she’d felt so inspired by that conversation that she’d come up with the idea of applying to a

particular trust where she had a contact. Nine months later, Solar Aid received its largest grant ever.

### Developing a shared consciousness

Every Monday, Richard compiled an update of activity from the previous week. The update included a status report regarding funding, but also information about supporter activity, for instance, a ‘tweet of the week’ and comments that had been left by supporters on the website. He initially shared these only with colleagues, but subsequently some trustees were keen to receive them too.

All this communication required a lot of time and effort - up to two hours per supporter-focused report. Richard said he had started doing it when the organisation was going through a difficult period, but that it was clearly making such a difference to how the different teams worked together that he continued doing it every week.

On one Friday, the day before Richard went on holiday, one of his colleagues noticed an opportunity to seek funding from Google. Though Solar Aid were perfectly placed to meet the criteria of the funder (Google’s Global Impact Award), no fundraising colleague had been aware of the opportunity. The colleague who spotted it held a service delivery role at Solar Aid.

Richard said that ‘all our effort to reinforce the vision and then create a shared consciousness about the sorts of things we were doing to achieve it, meant that everyone, from whatever team, was more likely to notice opportunities. Many of these would otherwise have been missed.’

Richard has now left Solar Aid, but Jamie McCloskey still works there, and tellingly, he talks in exactly the same terms as Richard. He says the strategy is to create a collective consciousness of people who spot opportunities to help solve the problem of the kerosene lamp. ‘Sometimes we do activities that don’t even ask for money; they are solely about inspiring people to share stories. The more this happens, the more people will be excited by the mission and work out how they could solve it. Very often those ideas and connections are far more valuable than if we had asked for money from that person.’

Richard remembers one of his colleagues, the Finance Director was initially sceptical. This was understandable, given that one tactic they used to inspire people to spread stories was to send a solar light to anyone who made a donation of £50 or more. This was a great idea in theory, but in practice, the Finance Director pointed out the many challenges, not least among them the cost of postage. In time, she told Richard she was finally getting it, as she received more and more evidence that these investments in inspiring supporters to feel great and share stories were clearly working.

For example, the first legacy Solar Aid received, of around £15,000, came from someone who had been sent one of the solar lights. ‘Another time, they discovered that several different people from one postcode had set up a direct debit to Solar Aid in the same week: ‘Baffled, while thanking one of them, we asked one how they had heard about us. They explained that they had been to a dinner party at their neighbours’ house and seeing a solar light in her kitchen, had asked what it was. They had really enjoyed hearing their friend’s stories about the solar light, as a result they’d all been inspired to set up their own direct debits’.

Solar Aid has deliberately created a shared consciousness. Their supporters have such a great experience that they feel inspired to make use of their ‘social capital’. This strategy has

inspired huge progress in the Solar Aid mission in just seven years. One measure of this progress is that the kerosene lamp has now been eradicated from Tanzania.

### The game is different now

On 18 March 2014, around 8.30pm, someone in the social media team at Cancer Research UK spotted a number of people posting selfies to raise cancer awareness using the hashtag #NoMakeUpSelfie. Not only did she notice the trend, but she felt empowered to react and did so very quickly.

Then by 9am the next morning, her team had discussed it and secured organisational buy-in to respond to the opportunity. They posted a selfie of Dr Kat Arney, a science information officer at CRUK, holding a sign that said 'We love your #NoMakeUpSelfie' and included a text code for donations. Two weeks later, £10 million had been raised for CRUK by people posting #nomakeupselfies. It was not luck that enabled CRUK to both spot and respond so quickly to this opportunity. It required a way of working that expects opportunities and threats to be fast and unpredictable.

The challenge is that the world in the 21<sup>st</sup> century is fundamentally different to the 20<sup>th</sup> century. Changes in technology have had a huge impact on the environment in which charities now operate.

If one of your fundraisers has a meeting at 9.30am tomorrow, it is quite possible that the tone of the meeting could be influenced by a news story or rumour on social media that breaks at breakfast time. This might not only reduce the chances of the donor having a great meeting, it could equally be an opportunity for your colleague to improve it. Either way, will your colleague know about the issues and feel empowered to respond?

While some companies are still moving slowly, to compete in the modern age, many have learned to become incredibly agile. As such, they have higher expectations than ever for the speed at which a potential charity partner would need to take action.

Howard Lake from UK Fundraising explained that 'not only is there now a twenty-four hour news culture, there is also a virality of the way news is shared. That means that a story that may or may not be grounded in truth, can now be shared and potentially misinterpreted more quickly than ever before.'

It's not just about speed; events are now more interdependent, less predictable. This summer, our friend Mary was able to visit museums more often than in recent years because her two children were happy to tag along and search those exhibition spaces for virtual characters as part of their new Pokémon Go obsession. At a business seminar last year, a technology expert told us that developments in virtual reality were on the way, but could anyone have predicted that this would mean more nine-year-old boys would visit museums in the summer holidays? What an opportunity if you are a museum that is ready to respond.

Driven by technology, events are becoming both faster and less predictable. To create great donor experiences, it's more important than ever that leaders in charities create adaptable, responsive cultures.

We now need a different kind of leadership

In *Team of Teams*, General Stanley McChrystal describes the primary reasons he believes his counter-terrorism units in Iraq had been repeatedly out-flanked in the first few years of their operation.

They were operating in an environment in which events happened more quickly and were more interdependent than had ever happened before. This was primarily because the enemy - terrorists seeking to destabilise Iraq - operated with a flat structure in which everyone understood the shared mission and was empowered to use their initiative.

Repeatedly, the Task Force's attempts to predict events and respond with carefully signed-off plans had failed. In the aftermath of the bombing by terrorists of a sewage plant in Baghdad, which killed hundreds of Iraqi men, women and children, it became clear to McChrystal and his colleagues that their current strategy was failing.

In order to respond to a highly complex environment, he decided that the Task Force needed to stop striving primarily to be efficient and instead become adaptable.

To become far more adaptable, McChrystal realised that two things were essential. Firstly, there needed to be a shared consciousness across his whole organisation, and secondly, he needed to devolve responsibility, so that everyone was empowered to act, rather than pass decision-making up through the chain of command.

Realising that the traditional model of military leadership was part of the problem, McChrystal forced himself to change from a chess-master into a gardener. As a gardener, his role was to create the adaptable environment in which people could achieve the mission.

Develop a shared consciousness – encourage people to think in terms of the overall goal, not artificial silos, and encourage information to be shared across the organisation

‘Persuading teams to network with other teams will always be difficult, but this is a culture that can be planted and, if maintained, can flourish. It just requires a gardener: a human, and sometimes all-too-human leader... making an ecosystem viable.’

General Stanley McChrystal

Intra-department activity

The first step is to get really determined to create a ‘team of teams’, a shared consciousness, in which everyone knows the goal and knows enough to help achieve it. Joe Jenkins explained that if this is what you want, then activities that take place across teams and across departments become critical, *all the time*. ‘The temptation in charities is to take your team for an away day...but if you want a team of teams who share one common enterprise, you’ve got to be constantly mixing things up, and not only does that help innovation, because innovation often happens when you include different perspectives, but it also means you’re breaking down silos all the time’.

As an example, at Friends of the Earth and again at Children’s Society, Joe took a range of people from *across the organisation* away for two days and asked the question ‘how can we give supporters a better experience of what we do?’

Every Monday at Children's Society, they have a meeting called 'ten at ten', which is where 'all the people who have anything to do with supporters, in whatever role, come together to share stories about what they did last week and what they're doing in the week ahead. It only takes 20 minutes, and it enables us to all be thinking about this as a collective enterprise, rather than just doing this in our teams.'

He always sets up projects or activities with shared objectives, so that 'it's not just that everyone knows what their objective is for their own bit, but they know what collectively we're trying to achieve. So campaigns and projects are always set with shared objectives...so what money are we raising; what volunteers are we engaging; what campaign outcomes are we trying to achieve; and those are owned collectively rather than by just one discipline.'

Liz Tait agreed that as a leadership group, they are always searching for ways to create a sense of unity. 'For instance, in most team meetings there will be some kind of team-building activity. There is lots of fun, clapping and noise...' She went on to point out that obviously a culture benefits from a range of personality types, so no one is forced to take part in group or public speaking activities that they don't want to.

'So there are a range of ways we seek to create the passionate team culture that we're looking for, for example each team writing a group blog, which favours a more reflective and less extraverted personality type. Another example was for each team to create a film of how they view their role in serving the animals, and another thing we did was one fundraising team created a tea party for another team. All these things increase trust and mutual understanding across the organisation.'

### Model it

Joe pointed out that as leaders you need to be seen to be working together on this, so this needs to be modelled at a senior level. At Friends of the Earth he and his counterpart, the Director of Campaigns, used to often talk on each other's behalf. This colleague used to stand up and talk about fundraising and why we need to put supporters first, and Joe would talk about important policy changes which were impacting the real world.

This gave everyone a strong sense that they weren't separate, trying to achieve their own objectives, or secure resources to further their own departments, but that they were truly working together.

### Be consistent

Giles Pegram and Tim Hunter described how at NSPCC they always tried to focus attention on the shared goal of rewarding donor experience, rather than raising money against individual targets.

In addition to making this clear, the fundraising leadership team made a change to the appraisal system for fundraisers. Until 2003, fundraisers received feedback from their managers according to whether they had hit their financial targets. In 2003 the system changed, so that fundraisers would now receive feedback, and a score between one and five, on four elements: their individual target; their contribution to their team; their contribution to the NSPCC mission as a whole; and, importantly, to *creating a great supporter experience*.

Devolve responsibility – empower everyone to think for themselves and take action

‘If you’re ever in doubt, make the decision. Do the right thing.’

Dr David Feinberg, UCLA Health System

There are two key elements to creating an environment in which people feel empowered to use their initiative and take action. The easiest to overlook, and the most important, is your personal leadership style. The greater the level of trust you develop, the greater the chance that people will feel they can take action.

Secondly, understand the importance of culture to this behaviour. There are a range of tactics you can use to increase the chances that this kind of culture will thrive.

Personal leadership style - communicate in a way that encourages others to lead themselves

Speaking about the culture at Solar Aid, Jamie McCloskey said that everyone feels empowered to take action, not least because they all know what they’re trying to do. When I asked if there was anything else about Richard’s style that contributed to this environment, he talked about the way Richard asks questions.

He explained ‘if you mention something to Richard, like there is a donor who has just given £50, he listens carefully, and then he nearly always asks you more, for example about “what else you could do to help the donor enjoy this gift even more?”. And this is not like some test or tactic, before telling you to do what he was thinking all along. He really wants to know what you think...so your brain is always searching for more and more ideas...and when you or someone in the team come up with different things he’s so genuinely enthusiastic...so pretty soon that’s the way you think even when he’s not there.’

In *The Living Leader*, Penny Ferguson explains this powerful technique that seems so simple but in truth is rarely used. As Jamie discovered, it helps signal to those around you that you believe that everybody is capable of thinking clearly and taking responsibility.

When people ask you what they should do, it is very tempting (and seems to be more efficient in the short-term) to give them an answer. Unless the building is on fire, Penny Ferguson advises that the wise thing to do is to respond by asking the other person what *they* think they should do. They may well say they don’t know, that’s why they’re asking you, but if you persist, saying you imagine they’ve got some instincts about part of the solution, most people end up sharing various ideas, including things they didn’t know they knew until this moment.

What is hard about this technique is that not only does it usually take more time, but it is also usually more tempting to give the answer ourselves, not least because in that moment we feel valuable, and in the traditional ‘chess master model’, being smart is what leaders are supposed to do.

Of course, as a leader, you may well share your ideas if need be, but often you don’t need to do nearly as much of this as you may have thought. Lisa Cousins, Executive Director at Ethiopiaid, stressed the importance of giving people time and space to think and share their ideas.

This habit is not easy at first, because both you and the other person expect you to give them an answer, but the benefits of practising this habit are huge. For one thing, your colleague, the person who knows the donor best, is now more likely to share some of those insights before any decisions are made. It is surprisingly easy to assume we know all the relevant facts after only a brief introduction to a problem.

Furthermore, if your colleague is involved in generating ideas, they are far more likely to take responsibility. Most important of all, the more you ask helpful questions about the challenges people bring you, the more you signal to them that you believe they are capable of thinking for themselves.

When we interviewed Jamie McCloskey, it was several months after Richard Turner had left Solar Aid, yet Jamie was adamant the culture was as strong as it had always been. He explained that a key reason for this was Richard's personal leadership style – it had helped everyone take responsibility for how things should be done, whether he was around or not.

Relentlessly reinforce and model action-taking

Joe Jenkins said that 'we spend a huge amount of time just encouraging people to do things. When I first got to Friends of the Earth, there was often a sense that somebody (senior) must have to sign this off, so in order for this to happen it must be someone else's job first. So we were always pushing back, "why don't you just do it?" and rewarding those who just made stuff happen.'

Another crucial tactic mentioned by most of the leaders we interviewed, including Laura Serratrice, Head of Fundraising at Bristol University, is the importance of leading by example. Modelling the desired behaviours is incredibly powerful, because people are far more likely to emulate what you do under those circumstances than if you merely encourage the same behaviour verbally.

Growth mind-set – model and promote the value of ongoing learning and development

If it is clear that the environment will continue to change in ways we cannot predict, one essential thing that leaders must do is help people to value continued learning. The *Great Fundraising* report found that 'the development of an organisational learning culture was deemed critical to the development of exceptional fundraising.'

Richard Turner mentioned a key tactic that had helped promote this positive attitude to learning was setting up a book club at Solar Aid. Each time they met, one person would bring a book that was in some way relevant and share the key ideas they thought could apply to Solar Aid's mission of 'inspiring people to spread stories'.

Throughout his career, both at NSPCC and in the sector as a whole, Giles Pegram has promoted the need for learning and development as a cornerstone of successful relationship fundraising. At NSPCC, this included a core set of training courses that everyone joining the fundraising team took in their first year. During the courses, fundraisers explored the Donor + vision of creating an experience that was 'different, better and more rewarding' through six principles that brought this idea to life.

One of the courses was called Flextalk, which helped people understand a system for understanding different people's communication preferences, called the Myers Briggs Type Indicator (MBTI). This not only helped fundraisers to be more skilful in understanding and meeting the needs of donors, but also helped improve internal communication, increasing the level of trust and flow of information between teams. This in turn helped the organisation respond to donors' various interests, rather than only their initial reason for support.

One leader we spoke to was Paul Relf, Supporter Services Manager at Prince's Trust. He knows that the challenges his team face will continually change, so at least twice a year he arranges for a mystery shopper to make calls and emails to his team. With the feedback, he

then conducts sessions with the team in which they discuss what could be learned about dealing with these situations.

One thing we found interesting about this example is that the mystery shopping is organised through an informal arrangement with his opposite numbers at nine other charities. This is the kind of pragmatic solution that makes your charity far more agile. Many charities have limited budgets and see mystery shopping as too expensive, so it does not happen. Paul has used his initiative and found a way to make it happen without a budget. The result is a solution which helps his team to continually find ways to adapt to the changing needs and interests of their supporters.

#### Culture – Ideas and activities that will help you create an adaptable, empowered environment

- As often as you can, do activities that mix people up to build trust and smash silo-thinking. Away days, department days, project groups are all an opportunity, which many charities regularly miss, to reinforce the ethos of working towards the common vision.
- Create project groups where the whole group works to a common goal and shares responsibility for the goals that underpin that.
- Give responsibility to those who display these ‘shared consciousness’ behaviours.
- Model this intra-team ethos with other leaders by taking an interest in and supporting other teams’ projects and objectives.
- Listen and often ask people what they think, so that you empower everyone to take responsibility.
- Constantly reinforce the notion of taking action as an important value in your charity, and model this value. Ask people how you can support them to make this happen, so that you identify and if necessary help solve what is holding people back.
- Promote a learning environment by investing in learning and development. See it as ‘investment’ rather than ‘spending’, because it helps improve the donor experience, and in turn, income.
- Repeatedly ask ‘what can we learn from this?’ and make adjustments to the way things are done.
- Make time for regular conversations about learning and development during one to one meetings.
- Promote a culture which encourages the willingness to evaluate what is working and what is not, and to learn from both. Ask ‘what can we learn from this?’ and show you are serious about the honest search for answers and solutions rather than placing blame. As *Black Box Thinking* by Matthew Syed explains, whereas in many fields people are reluctant to deal objectively with the issues when things have gone wrong, the reason the airline industry has made such huge progress in safety over the decades is its willingness to learn from mistakes.
- Clearly investing in courses and conferences is valuable, but even if your budgets are limited, there are still many other affordable practices that make a big

difference to your culture. Here are some practical techniques that others have found helpful.

### Six inexpensive, powerful ways to create a learning culture

1. Encourage everyone to make a development plan to share with their manager. As Liz Tait from Battersea Cats and Dogs Home points out, it can be an incredibly simple document, but the fact that it exists helps you and your manager to value and encourage personal development, and the many ways it benefits the fundraiser, the manager and the donor's experience.
2. Encourage people to find mentors with whom they can regularly discuss work and professional development issues. They don't need to wait for a formal mentoring system - encourage them to arrange something informally through colleagues and people in their network.
3. Create a book club for sharing ideas from work-related books. Richard Turner used this to great effect at Solar Aid.
4. Join volunteer-organised groups such as IOF Special Interest Groups, which hold inexpensive events and provide on-line ways to connect and solve common problems
5. Read and share helpful blogs; encourage others to do the same.
6. Read and share helpful blogs; encourage others to do the same.
7. As Liz Tait from Battersea Cats and Dogs Home suggests, during team meetings and away days, make time to include team building activities, rather than only discussing tasks and strategies.

## Conclusion

The truth is, the chess master style of leadership, though repeatedly glamorised in novels and films, never was the right thing to aspire to if we wanted great experiences for supporters. The donor always was much more than just their 'presenting behaviours' of, for example, the corporate partner or regular giver.

For as long as I can remember, fundraisers have too often been distracted by energy-sapping arguments over targets. Many of us have been painfully aware of missed opportunities to connect with how the donor might really want to help. Leading in a 'chess-master' style exacerbates the 'silo-mentality' problems inadvertently caused by typical charity structures.

Now more than ever, given the pace of change and the reality of the world in which we operate, the all-knowing, rigid style of leadership is unhelpful. If our charities are to respond and help supporters solve the problems they care about, leaders need to deliberately cultivate an environment that is adaptable, informed and empowered.

## Links across the Commission projects

The reality is that this project is linked to all the Commission projects. Unless the leaders of an organisation are completely clear that the organisation needs to be donor-focussed, there is a strong chance this will not happen sustainably, because it is not the path of least resistance.

However, this project most obviously has links to the following projects:

1. The use and mis-use of language
3. Satisfaction and commitment
13. Giving choices and managing preferences
15. The role of trustee boards and senior management
16. A distinctive service culture
24. Getting the right people as fundraisers

## Appendix 1.

We interviewed the following leaders as part of this project:

Lisa Cousins, Executive Director, Ethiopiaid

Di Flatt, Chief Executive of Sweetpea Charity and Greenhouse Fundraising

Martin Edwards, CEO, Julia's House Charity

Susan Foster, Fundraising Director, National Trust.

Tim Hunter, Director of Fundraising, Oxfam

Joe Jenkins, Director of Supporter Engagement, The Children's Society

Louise McCathie, Director of Fundraising, Birmingham Children's Hospital

Giles Pegram, former Director of Fundraising at NSPCC

Millie Perrett, Mid Value Lead, Cancer Research UK

Laura Serratrice, Head of Fundraising, University of Bristol.

Richard Spencer, former programme executive for the Growing Support Programme, RSPB

Liz Tait, Director of Fundraising, Battersea Dogs and Cats Home

Richard Turner, former Director of Fundraising at Solar Aid

Jen Waldron, High Value Donor Manager, National Trust

James Webb, Head of Major Gift Fundraising, Oxfam

Sara Whiting, Director of Fundraising, Hope and Homes for Children

## Appendix 2. Research sources.

Black Box Thinking, Mathew Syed

*Great Fundraising*, Adrian Sargent, Jen Shang and Alan Clayton

Leadership Plain and Simple, Steve Radcliffe

Leadership, Mindset and culture, Joe Jenkins

Prescription for Excellence, Joseph A. Michelli

The Living Leader, Penny Ferguson