



---

## Three steps to leading a great donor experience

### Project 17. Leadership

Rob Woods, February 2017  
Reviewed by: Louise McCathie

## 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.