

# Management File

Tips, resources and information to better manage and develop your working life

By Martha H. Schumacher, CFRE



Management File is designed to help readers overcome management and work challenges, while also providing tips, tools and resources of interest to nonprofit executives. If you have a management tip, challenge or information you would like to share, please email [ap@afpnet.org](mailto:ap@afpnet.org).



## How's Your Active Listening?

Ask fundraisers what skill they would most like to improve and without a doubt the vast majority will give the same answer: listening. Effective listening skills can mean the difference between making the pivotal connection that will enable you to realize your organizational goals and creating a situation that could threaten those goals and possibly even the credibility of your organization.

Active listening, in particular, is about really hearing what is being said. It is about listening so closely that you are able to repeat back what the other person said to you—not parroting the exact words, but instead paraphrasing the statement in such a way that it is clear you have actually understood the meaning of what was communicated to you. Such high-performing communication—internal and external—is at the heart of all successful donor, staff and volunteer relationships.

### Donor Communications

When meeting with donors, you cannot listen to them if you are doing all the talking. Remember the 75/25 rule. In donor meetings, you should be spending a minimum of 75 percent of your time listening and a maximum of 25 percent of your time talking. So make sure you are spending that 75 percent performing earnest, active listening.

Practicing active listening with your donors is a lot like being a private investigator. You spend the bulk of your time listening for clues—clues to exactly

what it is about your organization that excites and delights them, clues about their favorite activities, clues about what first motivated them to become philanthropic, etc.

Just like a good detective, you must ask the right questions, especially open-ended questions, to provide you with essential information about your donors and prospects and stimulate meaningful conversation:

- What is it about our organization's mission that holds meaning for you? Why?
- Which of our programs interests you most? Why?
- When you receive our various communications throughout the year (direct mail, email, newsletter, etc.), is there a particular communication that you find most helpful? What is it about that particular communication you like?
- Where should we contact you (home or office) and how often? Is there a particular form of communication that you prefer? Is there any particular form of communication we should never use to contact you?

When practicing intensive active listening, you will hear and understand the true meaning of what your donors are saying and recognize when the next question on your list should not be the next question you ask. Assess each answer in real time and consider a follow-up question, such as “How did that go for you?” or “Was that a difficult situation to be in?” or “What was it about

that experience that particularly moved you?” Donors, whether outgoing, shy or somewhere in between, enjoy talking about themselves, even when it means talking about their grandchildren or a favorite pet.

However, asking open-ended questions is just one way to achieve effective donor relations. When donors answer those questions, you must make sure you are listening closely, hearing them and not merely anticipating their answers or thinking about your next question.

If this sounds like Psychology 101, it is! Building donor relationships is just like building personal friendships or even romantic relationships. The key difference is that your job is to build a lasting relationship between your donors and your organization. To help, whenever possible make sure that others from your organization, including your CEO, key program staff, board members, etc., are also spending time actively listening to your donors.

### Organizational Communications

Many years ago, I worked for someone who told me, “Keeping me happy is your first—and only—priority. If I'm happy, then your job is safe.”

While I found that statement very troubling at the time, over the years I have come to realize that there is some-

thing to be said for making sure that your supervisor is pleased with your performance. Communications between you and your boss, and with other members of senior management, should be clear, concise and solution-oriented. Before you ask your boss a question, give serious thought about how you will ask it and whether the timing is right. Most importantly, when your boss or other senior managers answer your question,

practice active listening so that you understand their priorities and identify best-practice strategies to effectively address those priorities.

## Board Communications

In almost every instance, the people serving on your board are there because someone asked them. They must, of course, care deeply about your mission, but the key to recruitment is that

someone—another board member, your CEO or maybe even you—persuaded them to serve. Chances are that the person who recruited them is a good active listener. That person listened to potential board members' concerns about board service (time, financial expectations, etc.) and then carefully addressed those concerns one by one, based on his or her knowledge about what would alleviate their concerns and motivate them to serve.

Once they agree to serve, however, we sometimes do not listen as actively to our board members as we should. We may take their service for granted, and we might not necessarily follow up and follow through when they voice concerns and give us cues about why they are really at the table.

To illustrate, consider the following scenario. During a development committee meeting, the members discuss board and committee recruitment. The chair comments on how important it is to professionalize the board and says that this particular board “isn't there yet.” The chair adds that it would be embarrassing to invite “high rollers” to one of the board meetings the way they are run now because people like that would not come to socialize. Instead, “they mean business.” At that moment, one development committee member, who also happens to have the highest capacity on the entire board, responds with great passion and not a small amount of defensiveness, “Well, that's why I come—to see people and have fun!”

When practicing active listening, three important messages come through loud and clear. First, the committee member who goes to meetings to interact with other folks is more engaged than some may have thought and should be cultivated regularly through social gatherings. Second, the committee chair has some legitimate concerns about how the board conducts its business and its meetings, and those concerns need to be addressed in a meeting

To help managers keep up with the wealth of research on philanthropy, philanthropists and fundraising, here is a review of some pertinent findings.

## Stingy Baby Boomers?

By Russell N. James III, J.D., Ph.D.

**T**he connection between age and charity is nothing new. As people age, they are more likely to give. This fact also makes it difficult to compare the giving of different generations. One cannot simply look at what each generation is doing right now. Instead, one must evaluate each generation at comparable ages. Different economic circumstances across time further complicate such comparisons. This requires generational adjustments for different wealth and income levels.

Dr. Mark Wilhelm and colleagues from the Center on Philanthropy at Indiana University recently published such a comparison (*Journal for the Scientific Study of Religion*, vol. 46, pp. 217–232). Analyzing 30 years of data, they compared a prewar cohort (born 1924–1938) with a baby boom cohort (born 1951–1965). Examining both groups during middle age (35–49), the researchers found that baby boomers gave less than expected.

The average household giving of middle-age baby boomers in 2000 was \$1,371. However, if they had given at the same income-adjusted levels as the prewar cohort did during middle age, their average giving would have been \$244 higher. Most of this gap (83 percent) was due to baby boomers' lower giving to religious organizations. The lower religious giving corresponded with baby boomers' less frequent attendance at religious services.

The remaining 17 percent of the generational giving gap was due to lower secular giving. The lack of an increase in secular giving suggests that baby boomers did not divert their giving from religious to secular causes. They simply gave less to religion with no corresponding increase in secular giving.

Much has been made of the potential charitable windfall from anticipated estate transfers. However, the replacement of a more generous generation with one that, to this point, has been less generous may bring negative consequences. Nevertheless, while baby boomers do not appear to give at the same level as the previous generation, giving does increase with age. As this very large generation ages, its total giving may ultimately exceed that of the previous generation, even if boomers still give a lower share of their income.



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with the board chair and CEO. Finally, it would be a good idea to hold a meeting with the executive committee to discuss current board recruitment criteria, techniques, messages and orientation.

## Program Staff Communications

The other crucial communications area involves creating positive relationships among these pivotal organizational players, you and your staff. Ultimately, your job is to translate their knowledge into messages that will move and motivate your donors, so this partnership is essential.

Development staff members often cite communications challenges with program staff as one of the most serious impediments to building their development programs. Whether it is a hospital major-gifts officer having difficulties obtaining a heartwarming patient success story from a doctor or a director of development working on a foundation deadline with too little information from the vice president for programs to create a compelling proposal, establishing and nurturing lasting relationships with key program staff can literally make or break your team's ability to raise funds for your critical mission.

Active listening in this arena usually takes place through proactive measures. Set up monthly meetings with development and program staffers. When the budget permits, host the meeting over lunch paid for by the development office. At least once each quarter, hold the meeting at an off-site location. Establish a close relationship with the senior-most program person.

In other words, do whatever it takes to build trust between development and program staffers and provide honest answers when program staffers express concerns about how their programs are being communicated to donors. Take the opportunity to educate program staff about how development works, just as they educate you about how program works. Through it all, ask the same type of open-ended ques-

tions to give program officers the opportunity to tell you what it is they do (and what they are passionate about), and listen very closely to what they say and how they say it—even if it is not always what you want to hear! 🗣️



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