I just celebrated five years as Development Director with the Public Justice Center (PJC), a nonprofit in Maryland that uses creative legal strategies to eradicate discrimination and poverty. In the fundraising profession, where burnout is high and studies frequently show that staff turnover every 18 to 24 months on average, this is big news.

This is also big personal news because it marks a different type of work experience for me. During the past five years, I have grown professionally in an increasingly stable organization that continues to inspire me each day. I now understand that organizations that create healthy fundraising cultures — by encouraging creative partnerships and mutual respect among all staff and board members — are those that can reduce fundraiser turnover.

My retention (and satisfaction) is big news for the health of PJC also. The continuity in our fundraising program means stronger relationships with foundation leaders, donors, and other supporters. Certainly, I have not created these relationships alone. I enjoy an active partnership with our executive director, board members, and program staff. Together, we have doubled our donor list, diversified our revenue sources, and heightened our visibility in the community. Finally, because our leaders have not been distracted with finding the next person to fill my post, they have been able to get on with the business of accomplishing our mission. This is the best news.

Tatjana Loh is the Director of Development for the Women’s Building in San Francisco and she, too, has held her position much longer than anyone in their history. During Tatjana’s five-plus years, the Women’s Building has evolved from an organization with a “starvation mentality” to one with a solid bottom line and a reserve fund. The impact on the organization has been profound.

Like other “small shop” fundraisers, Tatjana and I each have our share of turnover stories collected from years of service to nonprofits. My experience at PJC has encouraged me to think about how works in a well-oiled nonprofit and how others can learn from this experience. My musings have found me in deep conversation with colleagues from around the country, and with the Small Shop Roundtable, a group of 70+ fundraisers from Baltimore-area organizations. I have rolled these ideas around with John Nethercut, PJC’s executive director. I have listened carefully to board members and donors from my organization and others. I have thought about my own experience as a board member and volunteer for other groups. And I have joyfully witnessed the transformation of PJC’s program staff as they dipped their toes into the realm of raising money and lived to celebrate it!

I hope these ideas will help you — board members, executive directors, and program staff — understand that fundraising is a team sport, and that employee engagement, contentment and productivity are organization-wide issues. Although this article is written for organizations that may be hiring their first development director, the information here can help any organization that already has a development director develop a more satisfying sense of teamwork and greater productivity among board and staff.
SETTING REASONABLE EXPECTATIONS—OR—GETTING WHAT YOU ASK FOR

Too often, “small shop” fundraisers report that they have been hired and expected to raise a goal that calls for a large increase in funding for the next year, only to learn that the board and executive do not have a solid plan or a history for such a large increase and are expecting the new director of development to do it single-handedly.

Another example of unrealistic expectations was expressed recently by one tired colleague: “Development directors should not be expected to also be communications directors, marketing directors, newsletter writers, board secretaries, capital project leaders, and more… while growing the donor base and doubling the funds raised each year.”

Certainly, in small organizations, fundraisers wear multiple hats, and successful campaigns have elements of marketing, public relations, and special events. Yet the successful nonprofit organization will carefully consider its priorities before dumping too much into one person’s job description. The likelihood of that person being successful is slim, and the risk of turnover great.

Understanding your organization’s expectations for this position will help you craft a clear and appropriate job description, hiring announcement, and initial work plan.

Board members should talk with peers from similar-sized organizations. Listen for clues about how paid fundraisers and boards work successfully together. Listen for potential pitfalls in the relationship. Think about how the board might need to change in order to maximize the addition of a professional fundraiser.

Executive directors need to find out how their peers work with their fundraising staff. Understand how you might grow in your own role if you add the “right” development professional to your team. Know your own strengths and weaknesses around raising funds and consider hiring staff who complement or support your own abilities. Also, be sure to hire someone you want to work with. Successful fundraising requires direct and honest communication, mutual respect, and teamwork.

Program staff need to be ready to participate in fundraising efforts. As the keepers of stories and the dreamers of new project ideas, program staff can help the fundraiser attract money and donors to support the work. Talk to your colleagues in other organizations and learn how they participate in the process of raising money.

The executive director, board members, and program staff should share what they have discovered. Then use the insights gained to create reasonable expectations for the new position. Consider how your organization’s development efforts can evolve, building gradually into a deeply rooted, revenue-generating system more capable of withstanding economic downturns and other nightmares.

If you do this thinking and planning before you have even hired the professional who will help coordinate your efforts you will have begun to create a healthy fundraising culture for them to join.

A GOOD FIT: VALUES AND MISSION

I believe in and understand the work of PJC. I am passionately invested in our vision of creating a more just society. This belief and passion keep me motivated to do my part, which is to coordinate the revenue-generation efforts that support the program staff who work every day toward our mission. When I do my job well, they can do theirs.

I learned the hard way that it is not as easy to raise money for things that don’t fuel the fire in my belly. Beyond the tried-and-true methods to meet the bottom line, fundraising is also an art — one that comes alive when your passion for the mission meets your expertise in technique.

A HEALTHY CULTURE BUILT ON CREATIVE PARTNERSHIPS

John Nethercutt says that I brought the notion of a “fundraising culture” to PJC. Essentially, a fundraising culture results from the application of the notion of creative partnerships among the development professional, board members, program staff, and the executive director, as well as with donors, other nonprofits, and community members. Healthy partnerships, fostered in part by the development director, can benefit the organization’s bottom line without compromising its mission.

John and I have reflected on the qualities that make our partnership successful. We genuinely respect each other’s roles within the organization. John expects and trusts me to lead the development efforts and he invests in the infrastructure that we need to be successful. I do not work in a vacuum, alone in the “hole at the end of the hall” that fundraisers joke about. Instead, John and I work in constant partnership. I prepare donor profiles for John’s calls and visits. He reports back and I store that information for later use. He shares opportunities gleaned through professional networks and I research to determine if we will pursue them. We actively co-write grant applications, combining my writing skills with John’s knowledge of program strategies and objectives.

We are not alone in our experience. Tatjana Loh also speaks highly of her partnership with Teresa Mejía, the executive director of the Women’s Building, who creates a work environment where people are empowered and
trusted to do their job. “Teresa assumes everyone’s doing their work, without micro managing,” Tatjana says. “She monitors and supports us as we need.”

Program staff can partner with fundraisers by providing them with access to your day-to-day work. Keep your fundraiser in the loop with regular stories or monthly reports. Understand that donors are not mysterious and distant money machines but are individuals with their own reasons to be committed to the cause. Welcome donors to interact with you or to witness your programs in action.

At PJC, program staff share news by email about clients, project successes, and even setbacks. I use this information in grant reports, solicitation letters, and other communications. This system keeps me well informed and provides fresh examples for storytelling. Often, I share information with donors just because the news is great or relevant to a larger issue of concern in our community, even when there is no specific fundraising goal for doing so beyond building relationships. The more connection our donors feel to our everyday work, the more inclined they will be to support us when we ask them to.

Program staff should make themselves available for conversations with donors. Donors enjoy hearing from those working on the ground and learning about the impact of their gifts. And don’t hesitate to ask how donors can help you reach your program goals. More than once at PJC one of our donors became involved in our program work, as when one helped distribute our recent film regarding the rights of homeless children to remain in school.

Board members must, above all else, be honest about their ability, willingness, and commitment to participate in the fundraising process. A successful organization involves board members in a variety of development efforts, from asking for money and reviewing lists of prospects to calling donors simply to say thank you.

The PJC board inspires me with their willingness to help when asked. One important reason for their responsiveness is that I have unfettered access to the board. I am welcomed at every board meeting with ample time on the agenda to review our development efforts. I stay in touch regularly by telephone and email. Organizations that insist on requiring all communications with the board go through the executive director are hobbling the ability of the organization to raise funds and retain development professionals.

Finally, one more plea to all members of the organization: Please include your development director in any meeting that has anything to do with funding or the possibility of funding. I cringe when I hear that a development director is the last to know about a big special event the board has decided must be done within six weeks. I worry about the implications of visiting a major donor without the development director’s knowledge. I wonder why fiscal year budgets are created and approved without the development director’s input — especially when some unreasonable gap must be filled. The development director must be seen as a crucial partner in every aspect of the work.

**INVESTMENT IN TRAINING AND INFRASTRUCTURE**

If there is one thing both my employers and I have benefited from in the 15-plus years I have devoted to fundraising, it has been the investment made by each organization in my professional growth. Early in my career, I attended trainings to learn the techniques and methods of fundraising. As I grew more capable and experienced, I began participating in workshops to polish my methods or add creative flair. Lately, I have enjoyed invitations to teach, which adds a deeper element to my professional growth.

I joined the PJC with more than 10 years of fundraising experience. Shortly after, I decided to pursue the Certified Fund Raising Executive (CFRE) standard. This type of advanced training gave me a chance to revisit my fundraising techniques and deepen my work. As I studied for the test, I began to apply fresh ideas and to rethink strategies to help us reach our goals. Rather than spending lots of time on many different strategies, I concentrated on “perfecting” a few tried-and-true methods. Eventually, I began to add new techniques, further enriching our efforts. But my favorite benefit of the CFRE process was the encouragement from my co-workers and board members, and they celebrated with me when I passed the test.

Invest in the fundraising IQ of the entire organization.

Successful organizations grow together in their development efforts. It is important to invest in the fundraising IQ of the entire organization. Formal classroom settings are one approach, but fundraising training, so allow your development director to carefully guide your efforts.

Scripted board members can make thank you calls or write notes on solicitation letters. These activities eventually increase their comfort level with other types of fundraising roles, including directly requesting funds. I work closely with program staff to prepare for donor visits and share strategies for raising funds for new project ideas.
Our executive director has stretched his wings at major gift trainings, implementing the methods he learned.

When all board and staff understand the basics of fundraising, they will see that fundraisers are not magicians who somehow pluck money off a tree. This realization helps create a culture ripe with reasonable expectations and creative partnerships, where everyone has a role to play. Also, development professionals and star board fundraisers do move on. An organization that cultivates a healthy fundraising culture through participation, partnership, and information sharing will be better at weathering these transitions.

It is important to note that investment in human capital is not enough. A successful organization is one that also invests in the appropriate infrastructure required to run an efficient shop, including appropriate donor software and adequate levels of in-house or contractual help.

ESSENTIAL INGREDIENT: WORK-LIFE BALANCE

Perhaps the most important factor in why I have stayed with the same organization for five years has as much to do with not working as with the work.

In general, fundraisers tend to try to do too much. We will strive to meet goals even if they are unreasonable. We will take it all on, jumping from one fire into another without a break. This is especially true when we work in organizations as the only person (or one of a very few) whose primary focus is on raising revenue. In fact, many of us thrive on the challenge. And we are constantly trying to out-do last year’s results — which sometimes means we are competing with ourselves.

I laugh often with my colleagues about these shared character flaws. But the painful reality is that, unchecked, they can lead to burnout and high turnover. At the end of my third fiscal year with PJC, I realized my own burnout had reached dangerous levels. Previously, I had cured that problem by searching for a new challenge with a new organization. In this case, I really did not want to leave. Inspired by a trailblazing co-worker, I negotiated a short sabbatical, from which I returned with a renewed spirit, increased creativity, and the awareness that work-life balance is absolutely critical to the success of our fundraising program. And because I structured this leave during a natural lull in our fundraising cycle, we did not miss a beat.

Tatjana Loh reports that a sabbatical also helped the Women’s Building retain their valued executive director. A few years ago, she and other senior staff created a temporary leadership team so that their executive director of 10 years could take a much-needed break. Like me, she returned refreshed and inspired. Although sabbaticals are not often standard policy in nonprofit organizations, I strongly encourage boards and executives to think about the benefits of this approach. The alternative could be high turnover in otherwise valued staff.

Achieving an ongoing sense of balance is important, too. I now regularly schedule quiet writing time and occasionally work from home. Tatjana chooses to work a four-day week. John takes week-long wilderness hikes twice a year. I encourage you to create a reasonable organizational culture that invites balance and where quiet times are as important as busy ones.

As Tatjana says: “Social change is a marathon, not a sprint. We all have much great work to do. The workplace is all about human relationships, and with careful attention to those relationships every day, we will reach the finish line.”

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