

Transcript – Episode 103 – [You Want Me to Do What? 10 Ways to Get Your Executive Director to Fundraise with You Getting the Credit with June Kress and Chris Rutledge](#)

Dolph Goldenburg: Welcome to the Successful Nonprofits™ Podcast. I'm your host Dolph Goldenburg. Today, we are speaking to the presenters of the saucily-named presentation from this year's Bridge Conference, June Kress of Kress Consulting and Chris Rutledge, the Chief Development Officer at Friendship Place. Together, they wrote and acted out, a series of five scenarios or as I like to think of them as five-one act plays that were titled, "You want me to do what? 10 ways to get your executive director to fundraise with you getting the credit." June brought 14 years of experience as executive director of the Council for Court Excellence to her role in this presentation. She is now the principal of her own leadership consulting and coaching firm. Chris drew upon his 25 years of professional fundraising, program and volunteer management experience to inform this presentation with June. I wish I could've been there and has seen June and Chris's presentation as they performed these scenarios at the Bridge Conference. But you know, one of the great things about having my own podcast is that I get to read about things that seemed pretty cool and then talk with the people who do them, so I get to have the next best experience, which is talking with them about their presentation at the Bridge Conference. So, let's get some great ideas for how all those development directors out there can get their EDs to fundraise for them and still the DD gets the credit. Let's roll the music and welcome June and Chris.

Hey, welcome to the podcast, Chris and June. How are you all today?

June and Chris: We're great. Doing well, thank you.

Dolph Goldenburg: Well, I just want to say Kudos to both of you for coming up with an out of the box presentation idea. Like you all, I go to a lot of conferences and there's a lot of boring presentations, so I do, however, have one question for you. After any of your one-act plays, did anybody stand up and shout, "I'm an ED, and it's not my job to raise money"?

Chris Rutledge: Well No, I don't think so. I think we had a few EDS in the audience and primarily development directors who are members of development teams, and you know we were trying to set something up that they could really relate to.

Dolph Goldenburg: So, share with me a little bit about one of the scenarios that you all acted out.

Chris Rutledge: I think one of the things that was most interesting, and you often do hear an executive director or a board member come to you with is, "Why don't we just throw a big gala?" Everyone thinks of that as the magic bullet because they've heard of some theater company that happens to have multimillion-dollar sponsors behind them raise a million dollars in one night, and it's never quite as simple as all that.

June Kress: I totally agree. That was one of the most fun scenarios that we set up because you could see people's heads going up and down, and there were actually a few members of boards in the audience as well. So, we set it up, and as you mentioned before, we actually set up the scenarios and then wrote the takeaways, lessons learned for each scenario, and then we wrote the script. So, we sort of worked backwards and as Chris said, you know, one of the takeaways from this one was that doing a gala is not the magic bullet. There are many, many other kinds of events that you can have that you can get your board involved in, get the community involved in. It doesn't have to be a very expensive gala.

Dolph Goldenburg: Before I was an executive director, I was a development director, and I would just cringe whenever I was in a board meeting, and every board member wanted to do a different type of event. So, if you've got 16 board members, you have 16 different event ideas. "Let's do a gala, let's do a golf tournament. Let's do a gold swap exchange. Let's do them all." And you're like, "No, we can't do that."

Chris Rutledge: What we recommended, we use a Friendship Place is a [Benevon Model] - the make more money models where you have people with table host to come and bring people, and it's a very much more organic way of getting people who care about the organization to bring people they care about the organization to an event, and it's something you can do as a much simpler model than a big fancy black-tie gala with a focus on the mission of the organization. We've used it at Friendship Place for over 13 years now, and it really is something that's proven to be successful. It is a lot of work. It's still also a lot of work, but the payoff is just so much greater than a typical black tie gala that everyone's been to a million times.

Dolph Goldenburg: It's funny to me that you say that [Benevon] Model is organic. I agree with you that it is, but it's funny to me because it's such a database models, so everything that [Benevon] has you do, they know from it having happened thousands of times what works, what doesn't and what your ROI is going to be.

Chris Rutledge: Exactly, and we're very strict about following the script on that. We promise people we will have them in and out within an hour and we do. I believe last year his breakfast, we actually clocked in four minutes early, and one ever complains about being set free four minutes early.

Dolph Goldenburg: What did that 56-minute luncheon, breakfast meeting... What did that look like?

Chris Rutledge: We have an MC who leads the event. We make sure we have a couple of people who are participants in our program speak and tell their story, have a very heartwarming moving video, again, featuring a participant. Then, for those who are familiar with the Benevon Model, the ask comes at the end. There's no ticket price at the beginning. There's no sponsorship at the beginning. It's an opportunity where someone who cares about the organization and who's been experienced with the organization makes the ask at the end and says you've heard from three or four people we've served. You know the importance of the work we're doing. You've learned.

You've been moved. Can you please make a donation at this time? It just comes so organically that rather than feeling like you have to buy a ticket to this gala, you're moved to do something at the end of the 56 minutes or 60 minutes, depending on how close you are to hitting that mark.

June Kress: I think the other thing that makes it such a success is that the speakers really attempt to draw in everybody that is there in attendance. I was on the Friendship Place board for 25 years, so the way they typically start is, will everybody who's ever given to Friendship Place please stand up? And so, you know, about half the room stands up. Will former or current and former board members stand up? So, we stand up. Table captains? So, by the end, everybody has stood up and in a way participated. So, there's a very welcoming atmosphere at this breakfast, and as Chris was saying, it's very inexpensive.

Dolph Goldenburg: Correct me, June and Chris, correct me if I'm wrong, but I think under the [Benevon] model you are also cultivating those attendees all year. So, it's not like this is the first time they're hearing of your organization and a friend said, "Oh, come to the breakfast." So, you've taken them through cultivation steps all year.

Chris Rutledge: Frankly, we need to do a better job of that ourselves, but we use this as an opportunity to make sure we do follow up afterwards on our pledge cards. For example, we asked people, are you interested about volunteering? Are you interested in a tour? And then we make sure that we follow up and reach out to people. So this, as you said, it becomes a cultivation tool beyond the day of the event. It's not transactional; it's very much more relational, and that is a much more moving experience for an event than the one everyone has been to with the chicken dish and the rice.

June Kress: Right, that was the other takeaway from the conference scenario that we did, which is that follow up is absolutely key. So, you know, even the scenario played itself out where I wanted to give Chris another idea, "Oh, let's do another, you know, I have another idea for you to execute." And Chris said, "Now, hold on. What we really need to do is follow up. We need to thank everyone we need to follow up." And there's nothing more important than cultivation after this event.

Dolph Goldenburg: That is just so critically important. I am so excited that you included that in the skit.

Chris Rutledge: We had a reception at a board member's home, a friend of the organization home just this past weekend, and one of the first things I made sure I did when I came in today was send cards to everyone who I knew it was there. Just a very simple *thank you for being there*. Oftentimes we get so much caught up on the treadmill of what's the next thing? What's the next event? What's the next application? What's the next direct mail piece? That it's so easy to forget that even a simple handwritten thank you note sent to somebody the day after they've been to an event does register as you care about them and it really does deepen the relationship.

Dolph Goldenburg: So I gotta ask, a dozen or two dozen thank you notes can easily take an hour or two hours to write address, stamp, etc. So, how do you carve out the time, Chris, to be able to do that immediately following the event?

Chris Rutledge: You just build it into your schedule for the next business day. After checking my email and checking my voicemails, I just made sure that was the first thing I did today is make sure I got those cards in the mail because if you don't, it'll slip to the next day to the next day till never.

June Kress: Here's what I used to do. I was the executive director of this organization for nearly 14 years, and my signature was writing small handwritten notes on the letter. So, my development director would prepare the thank you letter. Sure, it could be on, it didn't have to necessarily be on full size stationary, it could be on something smaller, but I never failed to write a short personalized, handwritten note. And I think people really appreciate that, you know, level of personalization.

Dolph Goldenburg: June, when I was an executive director, I did the same thing and I once had a donor who gave a couple times a year, so they've gotten, you know, four or five or six letters from the over a few years, saw me at an event and asked, "How do you get your printer to do such a genuine, realistic looking handwritten note?" And I'm like, "No, that's actually mine." And he was incredulous. So, the next time I signed a letter to him I turned the page upside down and I was like, "No printer will write a note." And then I turned the page, "You know, like at a 90 degree angle. Exactly this way. I promise you it's me." But yeah, it stands out.

Chris Rutledge: It does. It makes it different. And actually one of the things that I have colleagues, uh, who since coming to friendship place have taught me the importance of the blue pen that if you signed something in a black pen, people just assume it's an auto pen as you just mentioned. But we have an endless supply of blue pens, and I am absolutely certain that everything I signed is with a blue pen for that very reason. So, people know it's not auto pen.

Dolph Goldenburg: I have to say, we're on video so you can see this is actually my blue pen. I buy these in bulk. They're very nice pens, but they're also smudge because I still write an inordinate number of notes. If someone were to wet their thumb and run it across what I written, it will smudge.

Chris Rutledge: Is that a good thing? Because it indicates that it's real.

Dolph Goldenburg: Oh yeah, yeah, yeah. It's good. So it's like, I will admit, I'm kind of cynical, so if I get a signature that's blue, I'll actually try to smudge and I'd be like, "Okay, it's this, is this printed or not?" I'm pretty cynical.

June Kress: You know, Dolph, when I used to do solicitation letters around Thanksgiving for our year end appeal, I would take four or 500 of these letters with me in the car when my husband and I were traveling to New York. And my handwriting would get really bad because he'd

stopped short and you know, I would wreck the handwritten note, but it didn't matter because it really was from me. And people knew that.

Dolph Goldenburg: Yeah, absolutely. So, did you all include handwritten notes in the skits at all?

Chris and June: I don't think so. That would have been a great takeaway. So, we have this audience to learn that now that day you go.

Dolph Goldenburg: There you go. So, what are some of the other takeaways that you all are kind of drove home with skits?

June Kress: Well, we started off with a meeting with an institutional funder, and one of the takeaways was to know your audience because the scenario began with me saying, "Chris, I heard about this great foundation, and I think we should apply." And Chris said, "Hold on, how do you know that they're going to give us money?" Well, they gave money to this other organization and then Chris says, "Let me do the research," and the takeaway is know your audience. And research is really key to determine if your priorities match up with the foundation's priorities. And then the other takeaway was that funders are people too, because you know, if you're meeting with an institutional funder, you don't want to conduct the meeting where you're doing all the talking. You want to find out what does this person care about. And that was the lesson that we tried to get across.

Dolph Goldenburg: So, do you all have a 60/40 rule when you're meeting with funders, or like, what kind of split do you think is ideal in terms of the amount you talk and the amount you listen?

June Kress: I like 60/40 where I do 40 no more than 40 percent and the other person does 60 percent. Yeah. I think that's good. Or maybe. Yeah, I like it.

Chris Rutledge: That feels right. Yeah.

Dolph Goldenburg: What are some other takeaways you might like to share with our audience?

Chris Rutledge: For individual donors, it's really about the engagement element to you. It's part of being, having a conversation with them and making sure you're sensitive to their timing and to what they're interested in giving. If they're interested in veterans, don't come back to people with youth as an idea, come back to them with a veterans based program. So much comes down to listening and paying attention to what people are trying to tell you. People will tell you what they want to do it. You just have to really make sure you've taken the time to listen, and that's really something that goes throughout whether it be a foundation, whether it be an individual, whether it be a corporate funder. You have to take the time to listen, and I think as we wrote the scenarios each time (and June was wonderful as that executive director who didn't think about taking the time to listen), and so you really do have to think about why someone wants to give to you is because they care about you as a person and really taking that time, invest in that.

June Kress: We also made the point of cautioning people not to use jargon or shorthanded ways of talking about your program or your projects because it means it means a lot to us, but it doesn't mean anything to a funder or to a potential donor. In the script I came out saying... I forget what I said, but it was hilarious because I used all the, you know, the ROI on the GOV and we're having this program called CLASP. And people laughed because they could totally relate to jargon.

Chris Rutledge: And people in leadership often in particular and especially programmatic focused leaders are used to talking with their own audience. If you're talking with an audience of people who do the work you're doing, of course you fall into the jargon, but once you get outside of that bubble of people who are not in the room where every detail has been hashed out, they're not gonna understand any of this. You have to talk to people in a way that they're going to understand, and that means not going into detail. People care more about the individual stories than they do about the large numbers. The large numbers are important. Certainly there's a role for them, but if you sit in a room of people who you're hoping to support your organization and throw around numbers like, well, we served 27,852 people through this program... That's not what they're going to care about. What they're going to care about is you getting one person who you served in that program and warming their heart, telling about how the organization, your program, your organization made a difference in their lives, in many cases saved their lives. That's where you get the damp eyes in the room, the moist eyes in the room, and that's when you've convinced people why you're an organization where it's supporting.

Dolph Goldenburg: Yeah. To move back to June's point for just a quick second on jargon, I think so much of the jargon that we use in the nonprofit sector, we get through the government grant programs that we get funding from. Years ago, I ran an HIV housing organization and Chris, I believe your organization does some housing as well, and you probably get HUD funding. You probably fill out an APR, an annual plan, annual progress report. Right? But again, like most people, APR does not mean annual progress report. If you're talking to, you know, a mortgage originator or someone in the car business, they assume that means the annual percentage rate. So you know, when you're just throwing jargon out, it means a lot to those of us that, you know, wade around in government grants all day, but it doesn't to everybody else.

We're going to take a short break, and when we come back, we're going to talk about navigating a rocky relationship between the development director and the executive director.

The idea of acting out a scenario the way that June and Chris did at the conference makes me think about a podcast episode from earlier this year. We spoke with Kim Powell, author of *The CEO Nextdoor*. Kim and I discussed some of the myths of what a typical CEO looks like, someone who was larger than life with a perfect pedigree and a golden persona. That image is almost like an old-fashioned untouchable movie star. Kim, however, really turned that myth on its head with some reassuring data from her extensive research for *The CEO Nextdoor*. Be sure to go back and check out that episode as well as an earlier one that we did with Kim on creating a 100-day launch plan for your new CEO success, and I believe that was [episode 27](#). Both episodes are engaging and thought-provoking and well worth your time.

Hey, welcome back, June and Chris. So, let's assume we're talking about a development director who, whether it's a brand new relationship with an ED that's rocky or one that has soured, is now navigating a rocky relationship with their executive director. So, what are some things that a development director should do when things aren't so great between them and their ED?

Chris Rutledge: Well, I defer to the ED in the room.

Dolph Goldenburg: Chris, spoken like a development director, and I was once, so I'm not throwing stones. But that's spoken like a development director.

June Kress: You know what's really funny, Dolph, when, when we wrote the scenarios, we didn't make me a difficult ED to deal with. I was much more compliant. So, when Chris said, "Gee, I think we should do this," I didn't resist. I said, "Yeah, that's a great idea, Chris," whereas I think that the experience of many people in the audience, because they were laughing so hard and shaking their heads, was that they do work with EDs that are difficult to deal with. You know, I work with now as a consultant and my advice to all my EDs is, look you need to spend about 60 of your time raising money, and if you're not willing to do that, you are really in the wrong position. And I was very fortunate to have pretty good development directors, but it is a true team, and I think the key word that I would say to anyone working with me is you need to help me be strategic, and I need to help you be strategic. So, sometimes it made sense for my development director to go on the meeting. Sometimes, it made more sense for me to go. Sometimes, it made more sense for both of us to go. So, we looked at every situation individually and really came up with the best strategy here.

Chris Rutledge: June was a wonderfully compliant ED throughout the interview process here. I guess the first thing I want to say is that I love my President and CEO, so I'm in a great position right now. I've actually been very fortunate where my executive directors or president CEO's, we've gotten along great. I think that making clear to the ED about the importance of their role in fundraising is important. I think honestly, in any professional relationship, there will be conflict. And that's not just a development director in ED. It's within your own team. I'm a big fan of the "come to Jesus conversation" that it's better to just be vulnerable and put your emotions on the table and explain this is how I'm feeling now because if you're having a conflict, keeping it bottled up is not going to do anyone any favors.

It's only going to bubble up; it's better to be open and honest. That's how you salvage relationships is by being open and honest with both sides of the equation there. You may come to find that the relationship can't be salvaged, and it may be time to move on, but I would always argue in favor of just putting your emotions out there and letting it be known, "This is how I'm feeling and this is what I'm thinking. Can I get your thoughts on this?" Because that's how you build a team is by expressing that vulnerability.

June Kress: Communication was always critical. I used to sit down once a week and spend an hour with my development director going over all the priorities and figuring out, how do we get all this done? And it was always "we"; it wasn't simply, you know, he was going to do everything,

or I was going to do everything; we worked as a real team. I think the key to my success was not micromanaging the development director because nobody wants to be micromanaged. So, we're a good partnership, and that's key.

Dolph Goldenburg: So, so some of the things that I hear as takeaways from this obviously are good communication skills on the part of the development director. If there's not already a weekly meeting, and by the way, June, I'm a huge fan of the weekly meeting that you know, ask your executive director for a weekly meeting.

Are there some other things that the development director could do to maybe manage expectations with the executive director?

Chris Rutledge: Think just being honest from the outset and explaining that you're not looking to shirk responsibility and that you're not looking to deny the importance of what needs to happen, but to express a reality based picture and not a too-sunny based picture of what is possible. You just have to be honest and explain that based on your professional expertise, based on the research that you've done, this is what's achievable in this timeframe. *A vague disclaimer is no one's friend*, so it's important to be very clear that what you can do is what you can do, and you can certainly push yourself. You can certainly strive to always strive to do more and do better and set stretch goals, but setting unrealistic expectations will only lead to disappointment on both sides. So, best to be clear.

Dolph Goldenburg: I'm going to ask this question from each of your unique perspectives. So Chris, as a development director, and let me also be clear. I get you have a great relationship with your current president and CEO. Yeah, totally get that. But from your perspective as a development director, when does a development director know that it's time to go?

Chris Rutledge: Probably when it's clear that there that you're not being heard. You're not being listened to and that the goals are not aligned with what's possible. Probably also some degree of when you feel like you've done everything. I'm a big fan of believing in personal growth, and if you've done something a certain number of times the same events, the same activities, the same direct mail calendar, the same process, it's probably time for you to look beyond. I used to have somewhat memorized what lifespans are in this sector. I know for example, major gifts officers is about a year and a half, maybe two years and there's a reason for that is because people have exhausted their own learnings in a particular role and should take the opportunity to do more. So, I would say it's when you feel like you're not being listened to anymore is one sign, but also when you feel like you're not growing as a person is another sign. That's a key sign to start looking for what the next opportunity is.

Dolph Goldenburg: Chris, it's interesting that you say that because when I was a development director, I would always write a new thank you letter every month so that way you know, if you're a sustaining donor, you never got the same letter from me twice, but I could normally tell somewhere between like 40 and 48 months... Essentially. I've written a letter in October now four times and I'm just staring at the computer screen being like, I'm tired of writing this October

letter, or I'm tired of writing this New Year's letter, whatever It is, you know, and for me that was always been part of my bellwether. When I'm bored with doing it, it's time to go.

All right, so June from the executive director's perspective, when is it time, and obviously, this might be anything from a gentle nudge to throwing the bird of the tree. When is it time to let your development director go?

June Kress: I was in a situation many years ago where I hired someone who really didn't have the requisite experience. There's a lot of potential here, and so, I did a fair amount of training, and I think at some point you just have to face up to whether somebody is getting it or not, and I must say it took about a year, and I probably should have let this person go after more like six months. So, I think it really evaluating and reevaluating how is this going is, you know, as the CEO or the executive director, you have to think about this all after a reasonable period of time. I think about, you know, six months is a reasonable period of time. You'll know if your expectations aren't being met, if you're working together to set the priorities, but somehow the priorities get switched around. If you agree to the priorities and you put certain things on the back burner and then your development director puts their own stuff on the front burner, then you know, it isn't working. You've had the conversation already. You've maybe you've had two or three conversations, and then it's time because what's most important is the wellbeing of the organization.

Dolph Goldenburg: One of my professional mentors says that she never feels like she terminated someone too soon. Typically by the time she's done it, she's like, "I should've done this six months ago, which is what you just said."

June Kress: Yeah, never an easy thing to do, but chances are you're doing a big favor to the person. Then there are ways to let someone go in into, in a respectful way and giving them a chance to look for other work may be in a two or three or four week period. I mean, there's ways to do it.

Dolph Goldenburg: Absolutely. What I've got to have time for the Off-the-Map question. I have loved our conversation both about your presentation and fundraising in general, but I've got an amazing Off-the-Map question for you. You were both incredibly accomplished in the fields that you have chosen, but in a parallel universe where you have to be doing something else for a living, what are you each doing?

June Kress: You know, I know this sounds trite, but, Dolph, I'm doing exactly what I would want to be doing. I retired a year ago thinking about this for two years, knowing that I had mentored lots and lots of people, knowing that I loved being an executive director and set up a consulting practice and have a big network and I'm very fortunate to have clients and then I went to school. I decided it's never too late to go back to school, so I went to Georgetown for leadership coaching and spent seven months getting really good training. So, my practice is both coaching and consulting, which is kind of the yin and the yang, and I loved the diversity, so I'm doing exactly what I should be doing.

Dolph Goldenburg: That's awesome. You're living the dream.

June Kress: I am.

Chris Rutledge: That's a wonderfully diplomatic answer. I love it. So, I will equally be diplomatic. I really do love what I do. I love friendship place. I love the organization, the people we serve, the team we have, and it's just an enjoyable place to be with people who care about our community, and it's moving every day, seeing the impact that we're having on the dc area.

Dolph Goldenburg: Nice. I've got to reflect, June, as a former ED myself, I think all of us who've been ED's we spend, you know, a decade or two watching consultants, and we're like, "That's what I want to do." So, that's one is my cost of living the dream is, it's also my dream.

June Kress: It's definitely something worth pursuing. I loved every minute of my job. I was there nearly 14 years and I really did. I loved my board. I love the staff. I love the work. I love the people and the work and there's nothing better than that, but it made sense to do something different, and the timing was perfect.

Dolph Goldenburg: Nice. Well thank you both for taking the time to speak with our listeners today. I know our listeners are going to want to know how to get ahold of you. Listeners, you can reach June at www.junekressconsulting.com. When you go to website, you will get her contact information, and she has generously offered a complimentary coaching or consulting session to our listeners, and I say generously because as you heard, you know, she actually went to school to become a coach as opposed to lots of people who just hang the shingle out and call themselves a coach. So, it's genuinely a generous offer. Now, Chris can be found at www.friendshipplace.org, and by the way, Chris would really like for you to follow them on social media as well, so make sure you check them out on social media. Hey, June and Chris, thank you so much for joining us today.

June and Chris: Thank you for having us.

Dolph Goldenburg: Did you miss those URLs? You can find it all www.successfulnonprofits.com. Now, today's guest made a number of really great points, and I would love to hear about what made an impact with you and what you might like to get more information on, so hit me up by email, social media, however you want to do it, and let me know what made the biggest impact on you from today's conversation. Also, while you're on email and social media, remember friends that sharing is caring, and I am asking you to share this podcast with the people in your life who would benefit from the information that June and Chris had shared. Take a moment and send the link to people that you want to see succeed going forward. That is our show for this week. I hope you have gained some insight to help your nonprofit thrive in a competitive environment.

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