"Importance of Integrating Fundraising & Program Teams"

Project Fellowship in Inclusion and Philanthropy
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Summary

The non-profit charitable sector has two fundamental staff roles that are critical to organizational success: Fundraising and Program Professionals. Both hold a set of responsibilities that in their own distinct way help to advance and ultimately fulfill the missions establish by non-profit organizations. Regrettably, these two stakeholders may sometimes be operating in a dysfunctional or unproductive institutional culture that hinders their efforts. Invisible barriers and team silos can surface and create a divided work-culture and operational gaps that can unintentionally undermine the aspirational goals of these charities.

This issue does not manifest itself in all organizations, but I believe it still merits attention and discussion. In my research, I found those who believe that *"there is an alarming lack of transparency about conflict between fundraisers and program professionals"*[1]. Certainly, there is sufficient published articles and content to point out that this is indeed a recurring negative pattern and one that should be brought into the open rather than been perceived as a 'secret in the family'.

This project paper was inspired by my own journey working on the side of programs, yet always eager to learn from fundraising practices and fundraising colleagues. In this assignment, I explore five reasons or consequences that may emerge when operating in a 'Fundraising versus Programs' organizational environment. At the same time, I also present five ideas for building a collaborative mindset and shift towards an inclusive and unified approach of 'Fundraising AND Programs'. Reflections found in this paper are grounded in my experiences of the sector, research of expert references and published content on the subject. I also conducted an online survey with non-profit professionals of diverse cultural backgrounds interested in this particular issue to gather their perspectives.

Fundraising and Program Staff: Different Roles, Same Mission

It is helpful to be reminded of the functions that are generally expected to be performed by people in Fundraising and Program roles. In simple terms, I would say that as a fundraiser or someone in a development staff position, you are expected to lead or contribute to raising financial support that will enable a non-profit organization to function in order to meet its mandate. And as a staff working in a program or project capacity, you are expected to lead or support the implementation of relevant services and/or activities planned by your organization in order to meet its mandate. Different, right?. Even if these roles do take on distinct tasks, target different stakeholders or constituencies, and involve implementing unique strategies, both Fundraising and Program teams are ultimately and ideally guided by the same organizational mission and strategic planning process. Experts in the sector actually believe that *"A good strategic plan unifies under a common set of overarching goals, and identifies how everyone contributes to reaching them"*[2]. We require different types of competencies in a non-profit to function and be successful, so how do we end up with teams in the same organization that are working separately, in isolation and at odds with each other.

Here are **five possible reasons and consequences** that can explain why, and what can occur when teams in Fundraising and Programs are not working well together.

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[1] Heidi Massey. May 2010. From: http://www.pamelagrow.com/706/fundraisers-and-program-professionals-cant-everyone-just-get-along/
[2] Advancing Philanthropy Magazine. AFP. Fall 2016

(# 1) Lack of Understanding for Each Other's Roles

To quote a non-profit leader in Canada, "*In our organizations, we are all working towards a common goal of making life better for our beneficiaries. Yet sadly, too often, there is a systemic lack of respect and understanding of the strengths and skills that distinctive professions have to offer to the whole of our organizations*"[3]. This statement I believe perfectly captures how a lack of understanding or even respect of each other's roles or professional contributions can be counterproductive and be setting organizations to fail.

On one side, Fundraising as a professional activity has faced its fair share of skepticism. Perhaps in part due to the profession been relatively new and emerging just 50 years ago[4]. Many fundraising experts have written about the need to continue to defend their profession from misconstrued public opinions, myths and even some say attitudes of disdain.[5] It has been argued that some of these attitudes are in large part fueled by the ideas and emotional connection people have around money and also the act of asking for help. I do believe fundraising without training can be downright scary for some people and as other have said, can evoke vulnerability. Additionally, over the years I heard people in Fundraising roles feeling underappreciated and given limited recognition for what it takes to secure a financial contribution from a donor. Those who have written about this tension state that some organizations convey an attitude of fundraising as the "necessary evil", and go as far as saying that fundraising staff can be left feeling like it is others who are "doing the real work"[6] in their charities.

Meanwhile, those in Programs may be told again, and again, and again that "*donors are the bloodline of organizations*", that fundraising work is at the end of the day what 'keeps the lights on the building', pays their salaries and ultimately maintains an organization afloat. Over time this could create a sense of guilt and insecurity from Program teams that are operating those hard-earned fundraising dollars, and who for the most part have little or no relation with the donors, nor are they actively contributing to fundraising responsibilities. One survey participant stated that "*program staff may feel like fundraising is just not part of their job description, and maybe it really is not. Also, the language and way of thinking of the two professions are so different and distant that it is difficult to find a common ground for constructive dialog.*" Both scenarios may appear severe but I believe they do manifest themselves. This can create inadvertently a sense of separation and competition as to who is making the most meaningful contribution to the organization.

(# 2) Lack Relevance to Program Needs

What if you are fundraising to buy chickens, but what you really need are cows? Simple enough, but what I mean to illustrate is that when Fundraising and Programs teams are *estranged partners[7]*, this can create organizational misalignment and a lack of relevance to the program reality of beneficiaries, or if working for

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[3] Colleen Mulholland, President & CEO, Burlington Community Foundation. Quote from:
http://www.imaginecanada.ca/blog/marketing-not-fundraising
[4] AFP Fundamentals of Fundraising eLearning Course
[5] "Proud to be a Fundraiser". Cathy Mann. 2015
[6] "Did You Know that Non-Profit Fundraising Isn't Just for Fundraisers?" by Joe Garech. From:
http://www.thefundraisingauthority.com/fundraising-organization/fundraising-is-for-everyone/
[7] Conservation Fundraising at a Crossroads, Mary Humphries. 2005. From:
http://www.grassrootsfundraising.org/wp-content/uploads/2011/08/TREC_Conservation_Fund.pdf

social policy causes, it may mean taking action on something that will do nothing to move the issue forward. Integrating the way Fundraising and Programs communicate and operate, is not only important for improving staff relations, but it is critical to avoid a detour of what organizations have set to accomplish in their missions, and end up making a wasteful investment of donor resources and program efforts.

Many program staff understand their vital role in engaging with donors in this regard, one of my survey respondents shared: "*I have a crucial role in fundraising, helping my fundraising colleagues understand context needs, how we as an organization address those needs, and supporting the process of alignment between donor promise and what the organization is delivering in the field.*" This is an ideal scenario. Yet when financial targets weight heavily on the shoulders of development staff alone, and donors/funders declare strong preferences and ideas that do not always correspond to the work been done or the experience of program teams, we can end up making promises difficult to keep.

(# 3) Poor Reporting and Lack of Transparency

The recent examples reported in the news this year on the Centre for Addiction and Mental Health (CAMH) and their major donors speaking publicly about negative experiences, can no doubt be studied and examined by fundraising professionals on how to improve practices on stewardship and other elements of donor engagement gone wrong. However, it may also be an opportunity to be reminded why Program and Fundraising staff need to work side-by-side when it comes to engaging donors, from the very beginning of the relationship to reporting back to them. If this is collaboration does not happen, we run the risk of setting unrealistic goals with donors and then struggle to report back to them with any meaningful program information that can confirm results.

In an era where we are telling donors that we will work on evidence-based approaches like the CAMH case, we hold the responsibility to bring donors onboard as partners, sharing with transparency our program context and processes, and educating them on the issues. While we must keep an open mind to their ideas, we need to avoid developing a sort of 'script' based solely on what donors may want to hear back from us. As stated by one of the major donors involved in the CAMH dispute "*What I got was a bunch of gobbledygook just to appease me, stating that work had been done.*"[8] We should give credit to donors in terms of their ability to understand the complex realities of our programs and the issues we are addressing. Let's not be afraid of having full program discussions with them and the difficult conversations that can emerge, otherwise experts warned of scenarios where "*...eventually program results will suffer and the donor will receive little in return for their investment.*"[9]

(# 4) Missing Opportunities for Growth

Although I agree with a survey participant who said: "*...program staff have the ability to better assess the strengths and the risks related to initiatives that donors will support.*" it is also important to make an argument for co-creation. I understand this concept as ensuring that program staff does not become gate-keepers in the exploration of new ideas and program proposals that may come directly from fundraising

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[8] "Philanthropist 'questioned the credibility' of CAMH before rescinding donation" Toronto Star. October 2016. From: https://www.thestar.com/news/gta/2016/10/01/philanthropist-questioned-the-credibility-of-camh-before-rescinding-donation.html

[9] Financing Not Fundraising: 5 Lies to Stop Telling Donors. Nell Edgington. October 2011. From: http://www.socialvelocity.net/2011/10/financing-not-fundraising-5-lies-to-stop-telling-donors/

staff and our donors/funders. Donors and fundraising teams may be legitimately excited about initiating some new but different and that helps advance the organization's mission; they may bring new groups onboard to work collaborative and propose new tactics and strategies.

It is important that program leads can step outside their usual systems of operating, and consider these new ideas while relying on their experiences, but also recognizing the value of "outside the box thinking". In the case of CAMH, the major donor indicated: *"They took a very elitist attitude and said, 'Well, they do research differently than we do…It was my desire to make this a joint Canada-U.S. initiative and that opportunity got lost, and it's unfortunate."* [10] We should have a balance of not bypassing programs expertise and their knowledge, and at the same time, take a pulse from the funding environment that may be pushing organizations to change, merge and grow in different directions.

(# 5) Staff Burnout and Poor Retention Rates

It has been said that that turnover is higher among fundraising staff compare to their peers in the organization. Poor staff retention rates may not be surprising if indeed fundraisers are perceived as "*doing the work that no one else wants to do*"[11] but also if we fail to provide all the necessary conditions for our fundraising teams to meet their goals. *"Quite often fundraising peers are pressured to achieve ambitious resource acquisition targets, yet the timelines, dynamics, incentives and interests between the two teams are not always aligned."* says one survey participant.

A U.S. national study in 2013 entitled "Underdeveloped: Challenges Facing Fundraising" found very concerning trends. Their study found among other things that 50% of executive directors said they can't find well-qualified fundraisers and 40% of development directors were planning to leave fundraising altogether[12]. They also confirmed "*high turnover, long vacancies, performance problems, and the fact that large numbers of development directors are not committed to careers in fundraising*". These findings may require more in-depth analysis and discussion about the Fundraising profession and the sector as a whole. In the meantime, non-profit Leaders need to ensure that fundraising teams are well resource, supported and given the necessary tools to succeed, and this includes a healthy and ongoing engagement with program counterparts. Let's avoid isolating fundraising staff and making them feel that when it comes to them the only metric of success that matters is money.

We know we are a vibrant and resilient sector, so what could we potentially do to move away from a 'Program versus Fundraisers' paradigm? Here are **five constructive ideas or alternatives** to be considered in order to break away from the negative scenarios described above and develop a more collaborative approach between teams.

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[10] "Philanthropist 'questioned the credibility' of CAMH before rescinding donation" Toronto Star. October 2016. From: https://www.thestar.com/news/gta/2016/10/01/philanthropist-questioned-the-credibility-of-camh-before-rescinding-donation.html

[11] Creating a Fundraising Culture in your Organization. Stephanie Roth. 2012 From: http://www.cdsfunds.com/creating_a_culture_of_fundraising_in_your_organization.html

[12] Underdeveloped A National Study of Challenges Facing Fundraising. 2013. From: http://www.socialvelocity.net/tag/underdeveloped-a-national-study-of-challenges-facing-fundraising/

(# 1) Build an Impact-Oriented Organizational Culture

Organizations and teams need to ultimately define success the same way. An organizational culture that embraces an impact-oriented approach is able to build common ground between Fundraising and Programs. This means focusing on working towards achieving, measuring and documenting results that demonstrate our commitment to our missions and can then inspire donors to become supporters of our efforts. By been impact-oriented, we are able to be accountable[13] both to our donors but also our beneficiaries, while it confirms how non-profit organizations are important agents of change in society. This approach requires new tools, systems and greater emphasis on evaluation mechanisms. Organizations like CanadaHelps are assisting by developed resources to support charities make this shift.

(# 2) Promote Cross-Team Relationship Building

Development staff members know that fundraising is not about money, but about relationship building. The same idea can also translate internally within organizations. Addressing gaps between different teams can begin to be tackled by simply creating multiple opportunities and moments for people across Fundraising and Programs to foster support, understanding, and mutual learning. Experts suggest placing emphasis on relationship building, listening to each other and arranging 'discovery meetings'[14], where staff share their goals, challenges and find consensus on how to work together in a more coordinated manner. Leadership should play a key role in promoting such spaces where teams and colleagues come together as one organization.

(# 3) Flexible Job Descriptions and Ongoing Learning

A survey participant suggested: *"Job descriptions must clarify and specify roles (as what should program staff do to support fundraising, and how fundraiser should connect with program staff); establishing internal process that assures integration and collaboration (working groups, approval flows, etc.). Assure that those in leadership understands the importance of the collaboration between the two areas."* Expanding on this comment, we could also consider the notion of having 'flexible job descriptions'. While we may need to assess the feasibility or implications of what 'flexibility' means (in a way that does not erode other aspects of employment conditions), I feel there is an argument to be made about embracing a more fluid organizational structure where people could potentially come in or out of roles or tasks associated with different teams. Why not having fundraising staff engage more directly and hands-on with program beneficiaries? Or let's have staff working on program teams be the ones leading a presentation with major donors?

Following this line of thought, others have written and suggested job shadowing as a way to promote more empathy and expand new skills and competencies for all employees. If we advocate for a cross-team learning organizational culture, then we are taking steps to appreciate the value that each staff brings and

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[13] Measure Your Organization's Impact. Advancing Philanthropy. AFP. Fall 2016

[14] Rory Green. 5 Steps to Unlocking Hidden Fundraisers: A Practical Guide to Working Better With Program Staff and Raising More Money. 2014. From: http://www.pamelagrow.com/4267/5-steps-unlocking-hidden-fundraisers-a-practical-guide-working-better-with-program-staff-raising-more-money/

how our different roles and success are interconnected. We may want to take inspiration from the civil rights movement motto, *Let's integrate, not segregate*!

(# 4) Cherish Innovation inside Organization

Innovation calls for organizations to find new ways to work together and embrace the process of risk taking and learning from failures as well. In this case, innovation can be a strategic force and an important ingredient that allows Fundraising and Program teams to move out of every day, and start brainstorming new ways of achieving team and organizational success. When asked 'what they would recommend to strengthen the working relation and collaboration between Fundraising and Program teams', a survey participant responded: *"We need to learn from successful case studies of social enterprise and from successful models of stimulating inventions and innovations practices that are making a difference in our field of work."*

(# 5) What is Fundraising?

"Fundraising is Beautiful"[15]. It is indeed a beautiful profession that centers on resourcing, sustaining, growing and ultimately fulfilling the missions and visions set by non-profit charitable organizations and social causes around the world. In a survey conducted in 2014 to one hundred leaders of the non-profit sector, they described that fundraising to be among the top challenges faced by the sector[16]. Building in fundraising education across all levels of staff and volunteers is quite valuable and should be done, but that alone won't cut it. There needs to be an entire mind shift as to how every stakeholder in an organization understands fundraising and how each person contributes to resource development in their own way.

This mind shift can also be an opportunity to think about donors in an expanded manner and not just as financial contributors. They are our partners, our allies who are motivated and emotionally connected to the work that we do as non-profits. Finding ways for donors to connect to our program work, may be a good strategy to ensuring their long term commitment to the organization. For example, we may want to seek their advice, invite them to volunteer or interact with program operations and sites. Finding ways to improve collaboration between Fundraising and Programs can lead to strengthening overall donor experience, retention and stewardship.

Finally, it is evident that *"Fundraising and Programs need each other"*[17] nonetheless, organizations may sometimes need to work harder at ensuring that these two 'children of philanthropy' are functioning effectively and in a collaborative manner. Through this assignment, I wanted to present what are some of the issues that emerge if this does not happen, and ideas for how to improve such scenarios. We know organizational culture takes time to change and shift, but exploring and acknowledging negative patterns we have created internally can be the first way to move forward.

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[15] Armando Zumaya, Fundraising expert
[16] Advancing Philanthropy, AFP. Fall 2016
[17] The Crux – Aligning Fundraising and Programming. Blog 2013. From: http://npengage.com/nonprofit-fundraising/the-crux-aligning-fundraising-and-programming/