

Avoiding the Operational Black Hole

Development leaders often take on too many operational tasks, neglecting fundraising

by Richard Tollefson



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Nonprofit leaders looking to improve their time management skills can employ two simple tools: calendar blocking and color-coding. Calendar blocking is, quite simply, reserving blocks of time for specific tasks. Reserve the most time for those important, prioritized tasks. Use an Excel spreadsheet, a simple day planner, or Microsoft Outlook in a weekly view. Color-code tasks based on higher priorities or similar functions so that a single glance visually illustrates how much time is committed to certain categories of tasks. Also consider free apps with task management and scheduling built-in; examples include Plan, Week Plan and PromoDone. And remember to schedule breaks between tasks, which aids in concentration and productivity.



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► “There is not enough time in the day to get my job done.” It’s a complaint echoed by a majority of fundraising leaders. For many who have risen through the ranks as chief development officers — or even CEOs — it often boils down to an excess of time spent on operations.

Unused to managing people and processes, new leaders can become mired in operations tasks, often sacrificing fundraising productivity, which trickles down to poor program and service delivery to constituents. Leaders may find themselves knee-deep in any number of “back house” operations activities — data and information management, HR, IT, marketing, administration, finance, budgeting or accounting — instead of providing strategic direction, orchestrating fundraising activities, working with the governing board or establishing a positive community presence.

“Knowing which HR personnel issues I had the authority to handle myself and which I needed to bring to management was a struggle,” says Whitney Fulton, former vice president of institutional advancement for Thunderbird School of Global Management and consultant with Phoenix Philanthropy. “Clarity around authority is critical.”

BE SELF-AWARE AND EFFICIENT

According to Fulton, leaders who know their strengths and weaknesses can avoid operations timesinks. Some leaders, she says, believe they excel at everything. “Being self-aware and reflective is important; you will hire a team that’s high-functioning in all areas *because* you know your areas of weakness and are addressing them.”

Contrary to popular belief, efficiency is improved by narrowing focus, not taking on more tasks. In their book *The One Thing: The Surprisingly Simple Truth Behind Extraordinary Results*, Gary Keller and Jay Papasan discuss the fact that doing fewer things for more effect is more important than doing more things with unfavorable effect. What’s more, they preach that all tasks don’t deserve equal time.

So, what is a development leader to do when operations loom? For starters, Fulton says managers should tap the expertise of executives sitting on their nonprofit boards, who can help clear some operational hurdles.

“They can open up their address book and suggest contacts for help with accounting or marketing focus groups, for instance. One of our board members brought in his team to do a pro-bono salary study for us. Another put us in touch with a peer institution going through a similar campaign so that we could share efficiency strategies.” In some cases, board members, themselves, can function as highly experienced, but unpaid, consultants deployed individually, on task forces or committees.

OPERATIONS MANAGEMENT SOLUTIONS

“The larger the disconnect between the frontline and support staff, the more operational inefficiencies you will notice,” says



Fulton. The key for development leaders is open communication — ensuring everyone understands one another’s role and how to support one another. Another key: offering the same level of respect to those completing back-office operations as those operating on the front-line with donors.

Create an in-house operations SWAT team: Leaders should hand pick individuals within their overall organization — not necessarily within their department — to lend expertise in finance and accounting, marketing-communications, HR or other areas. Their insights can be used to streamline efficiencies and delegate tasks.

Hire a dedicated operations manager: A professional can focus on project and information management, administration, finance/accounting, and new business development and marketing, allowing the manager to manage.

Outsource operations: “We are seeing operations-only consulting firms pop up for fundraisers because of nuances in the gift-processing arena. You want someone sophisticated,” says Fulton. “Instead of hiring eight different people for these functions, you hire one firm.” Finance and accounting, HR, IT and marketing-communications tasks can also be effectively outsourced.

Consult peers: Affinity organizations and nonprofit peers are often willing to share operational success stories. Reach out.

Says Julia Gallagher, director of development technology and operations for Memorial Sloan Kettering Cancer Center, who works with technology and operations consultant Zuri Group, “Outsourcing our high-volume processing enables us to focus on top constituents, and partnering with a technical consulting firm to handle hundreds of hours of programming enables us to stay nimble and focused on high-priority, long-term strategic initiatives.”

Whether creating an in-house ops team, hiring an operations director or contracting out, it is clear that the fundraising leaders with the most success are those who prioritize and delegate operational functions that aren’t their strengths. ■

