

CARPE DIEM ... CONNECT THE DOTS ... AND OTHER TIPS FOR SUCCESS

... an occasional message from Virginia O'Brien Record,
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Prologue: This article is intended to aid young professionals just starting out in the nonprofit sector. The author's message is six-fold:

- *Carpe diem* ... Seize the day.
- Learn to think differently.
- Think about learning differently.
- Take excellent notes on your excellent adventures.
- Keep your "dots" connected and up-to-date.
- Try not to burn any bridges in the process.

Introduction

I have just finished a task that took me all of 20 minutes to complete, a task that, 30 years ago, might have taken me a day (or more) to complete. With any luck, those 20 minutes of my time will wind up in a six-figure gift to support a former client's nonprofit organization. Here's what happened:

I recently sent an email to the former client just to catch up and see how things were going and to ask if I could do anything to be helpful. My client responded to my email with an impressive update on her organization's activities, and – almost in passing – mentioned that she had run into a certain Ms. "X" at a nonprofit event the previous weekend. She said that they had a wonderful conversation about her organization's activities and that it was actually Ms. "X" who had sought her out.

("HMMMMMMM," I thought to myself, "Ms. 'X' had always been on the donor prospect list, but the timing had never been right.")

Now, the timing seemed perfect.

I sent back an email suggesting that my client send Ms. "X" a letter (a) telling her how great it was to see her again, (b) elaborating on their conversation by including some additional details on the organization's activities, and (c) requesting consideration of a one-time, special gift directed to a very specific program in which I knew that Ms. "X" would have an interest.

I offered, on a *pro bono* basis, to prepare the letter, understanding that my client would have to fill in some of the blanks and do some general tweaking. Twenty minutes later, the letter was in good enough shape to send to the client, who has since filled in the blanks and sent to Ms. "X."

(My client received a five-figure gift almost immediately.)

Why am I telling you this? Because sometimes opportunities will arise when we least expect them, and we need to be prepared to "seize the day." I hadn't really thought about Ms. "X" in a long time (especially in conjunction with this particular nonprofit), but when my client told me of the conversation, all I could think of was the grand opportunity that was looming before us.

I have found over the very long time that I have been in the nonprofit sector that most people just can't see (or think) beyond the moment. They sit politely in meetings

listening (or – more often – not) to what is being said, but they can't go beyond the subject at hand to think of the vast possibilities and opportunities that exist both in and outside the room. Only a handful of people I know can see way beyond the moment and connect the dots accordingly.

Is this innate, or can it be learned? I think it's a little of both.

Tips for Success

I admit it; I'm getting old(er), now of an age and stature to be asked for my advice by those way more youthful than I. I find that I am more frequently in the position to mentor young nonprofit professionals – particularly fundraisers – so I have developed a short list of tips for success. Consider the following:

1. Take the time to read at least two newspapers every day, and read the print versions because the online news services do not always include everything that the print versions do. Learn to read the news *differently* from the way you were taught in school or at home; pay careful attention to the Business, Style, and Community News sections. Don't forget the obituaries.

Be sure to read at least one national paper (*The New York Times* or *The Wall Street Journal*, for example), but never forget the local papers, as dull as they may seem at times. Most definitely read every issue of *The Chronicle of Philanthropy* from cover to cover (but don't focus on the employment section unless you have held your current job for at least two years, preferably more).

I often talk about the wisdom of Tess McGill (the character played by Melanie Griffith in "Working Girl") as an example of how to read a newspaper. Tess, you may recall, would read the gossip column every morning while riding the ferry to Manhattan, and she would clip or highlight articles about famous people, tucking them away for future use. That little technique served her well in the end, and the message translates beautifully for fundraisers, too.

2. As you read the papers – especially the local ones – take special note of people who have received honors and awards or who have involved themselves in some local charity activity. If any of these people is related to your organization – even tangentially – send a *handwritten* note congratulating them on their award or honor. Tell them that you read about the terrific work they are doing. Keeping your organization's name in front of these people is a very smart thing to do and will serve you well in the long run. (If your handwriting is appalling, then print the note [or take a refresher course in penmanship], but make it personal one way or the other.) You may be pleasantly surprised by the response to your thoughtfulness.

3. I also recommend that you prepare a "Note to File" after every meeting with a donor prospect or volunteer and to do it the moment you return to the office while the information is still fresh. Jot down everything you can recall, and include even the minutest details because you never know when that information will make a difference. (You may think that you'll remember it all, but I can assure you that

you won't, especially as the aging process kicks in.)

Notes to File do not have to be novels but, rather, should outline the sense of the conversation. Notes to File should be reviewed regularly for any follow-up that may be necessary. Developing a simple format and sticking to it will make preparation easy as pie.

Case in point: Many years ago, a neighbor (who was also a good friend and colleague) and I were talking about his childhood and family. Here was a man who was involved in any number of local and regional nonprofit organizations – a generous soul, to be sure. He happened to mention that his stepfather (a Swiss businessman) had grown up with and was best friends with the chief engineer for the George Washington Bridge project in the mid-1920s. In fact, it was his stepfather's friend who made the whole project possible!

Following our meeting, I made a Note to File and tucked it away for the future, never dreaming that – nearly three decades later – it would turn into a five-figure gift!

Fast forward to a development committee meeting of local university press council, of which I was (until very recently) a member. Professor "X" (an historian and scholar of American Studies) made a presentation to the committee concerning a book project for which he needed a \$10,000 subvention to be able to include better photographs and maps. His subject? The history of the George Washington Bridge! (But of course!). Within hours, my friend and his brother had each pledged \$5,000 to support the book project. One phone call following the

review of an almost ancient Note to File did the trick.

Imagine if I had not been paying attention when my neighbor was reminiscing about his family!

4. Keep your Rol-a-Dex® up-to-date. (I know. Many of my younger readers probably don't even know what a Rol-a-Dex® is!) If you are not using a – dare I say it? – paper card file, then just make certain that your contact management system (read: address book) – in whatever form it may exist – is always current.

This may seem to be a "no-brainer," but (as demographers are quick to remind us) 20% of the American population moves every year and as much as 50% of the population changes an email address annually. Consequently, keeping up with the whereabouts of Mr. or Ms. Jones is a MUST. Besides, you may need to dig into the recesses of your address book one of these days for a name you haven't thought about in a while. (Trust me on this one.)

Example: One of my recent nonprofit clients – a juvenile justice advocacy organization – was developing a database of researchers and experts on the implications of adjudicating children in the adult justice system, the idea being to identify and engage a pool of experts who could be called on to react to high profile cases, review documents, come together to help plan the programmatic strategy for the organization, etc. I was given a list of prospects to review, just to see if I might know anyone. Of the 20 or so people on the list, I knew at least half of them well enough to "open the door" for the organization.

How did this happen? In 1976, I found myself in the president's office at a major research university. A new graduate program – one that, by the way, grew quickly to be one of the top five in the country – was established during my tenure, and I was involved in helping to get the school off the ground. As a result, I came to know some of the best academic minds in the country (if not the world) in the field of criminal justice.

When the client presented the prospect list to me, I offered to contact several of my former colleagues to see if they would be willing to join the bank of experts and/or recommend other colleagues in the field. One thing led to another, and as a result, the prospect list grew exponentially. Today, the organization has close to 100 researchers and experts in its database – some of the best minds in the country. Thirty of them have agreed to join an advisory council to the advocacy group. Many of these names were suggested to us by my former colleagues. In fact, one of the suggestions was a person I lost track of in 1969, when we were both student activists. (How nice it is to reconnect!)

Had my address book not been up-to-date, we would still be scrambling and spending precious time trying to find some of these people.

5. Don't burn any bridges, even when you're tempted. This is perhaps the most important advice I can give to you. (It is also the hardest advice to take.)

OK, you're like oil and water. You can't stand being in the same room with him or

her. You think that he or she is a real moron with no redeeming value whatsoever (and he or she may be just that!). BUT, you have to work together. BUT you can't take it anymore! You're going to tell him or her exactly what you think.

DON'T DO IT!!!! It will come back to haunt you. You may think you'll never run into this person again, much less have to deal with him or her ever again, but I can assure you ... you WILL. The best advice I can give here is to do your best to cooperate and get the job done, and when all is said and done, to walk away with your head held high. It will serve you best in the long run.

Conclusion

Let's face it. There are people who can see beyond the moment, who can look at every moment as an opportunity, and who use the opportunity to make connections when others can't see beyond the people in a room. The former are the people who will succeed in whatever activities they undertake. Why? Because they have vision; they understand long-range implications; and they are willing to take risks (and maybe falter from time to time).

Think about these tips ... change your way of thinking if you have to. I promise that if you do, you will be a grand success.

About the Author

Virginia O'Brien Record spent over three decades as a nonprofit manager before establishing The VOR Group, Ltd. in 2007. A veteran fundraiser and administrator, she served (primarily in development and public affairs capacities) at such institutions as Rutgers, The State University of New Jersey, Robert Wood Johnson University Hospital (New Jersey's premier academic medical center), and the American Hospital of Paris. When she returned to the US in 2001, she joined the staff of a Maryland-based family trust as a program executive. Virginia has observed philanthropy from both sides of the table and believes that nonprofit organizations, by their very nature, must set the highest standards for themselves.

The VOR Group, Ltd. is a nonprofit management consulting firm that draws from a network of seasoned management professionals and works in partnership with its clients to tailor programs suited to the full spectrum of nonprofit issues. The VOR Group, Ltd. works with brand-new nonprofits in need of assistance in the start-up phase of the nonprofit life cycle as well as more seasoned nonprofits looking to refresh or redefine themselves. The services of The VOR Group are well suited to charitable nonprofit organizations, private foundations, membership associations, and trade unions alike.

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