AFP Wisconsin Development Professionals Conference  
Wednesday, August 13, 2014  
Hosted by AFP Greater Madison and AFP Southeastern Wisconsin  

Bridging the gap between yesterday and tomorrow  
What keeps you awake at night?  
The good, the bad, and the ugly…  

Session overview  
What’s happening? What does the future hold? What keeps you awake at night?  
The times they are a-changin’. So sang Bob Dylan back in 1963. And those words still resonate today – whether in politics and society, or fundraising and the nonprofit sector.  
So what do advanced executives do? What cage-rattling questions (CRQs) do leaders ask? How do leaders use conversation as a core business practice?  
What resources do leaders read and follow? How do leaders fight the fact deniers and ill-informed bossy pants?  
How do we take risks, challenge assumptions – theirs and our own – to make change?  
Join this conversation. A conversation of risk-taking and courage. A conversation of challenges and discomfort and disagreement.

Where did this topic come from?  
I got a telephone call in 2012. They wanted me to lead a session with professionals on “what keeps senior people awake at night.” I was thrilled to receive the invitation to design and facilitate a conversation – about questions they sent me, and questions I worry about.  
Off I went to Harrisburg, Pennsylvania. I thought the conversations were great. Then I received an email: “Everyone is still raving. What a stimulating session. I hope this is the beginning of a worldwide conversation! And you’re just the person to get it started. We’ll be holding additional gatherings of our senior professionals to continue the discussions on our own.”  
And then AFP Toronto Congress 2013 asked me to do this session. Of course, I updated and added and changed and… And now Wisconsin in 2014! Yippee!

So here’s where you and I start…  
• What keeps you awake at night?  
• What are the big questions you want to explore – feel that we must explore?  
• What are the changes that you and I have to accommodate?  
• What do we have to unlearn? (And that’s the hardest thing to do.)  
• What do we have to learn?
Introduction: From one of my favorite thinkers and writers (Seth Godin)

Is everything okay? Unless you work in a nuclear power plant, the answer is certainly no (and if you work there, I hope the answer is yes). No, everything is not okay. Not in a growing organization. Not if your company is making change happen, or dealing with customers. How could it be?

And yet, that’s what so many managers focus on. How to make everything okay.

We spend so much time smoothing things out, we loose the opportunity for change, or for texture or creativity.

Instead of working so hard to make everything okay, perhaps it is more helpful to work hard at living with a world that rarely is.¹

To start: Conversation is a core business practice² and a personal joy.

Ask tough and cage-rattling questions...questions that are a product of a fair dose of curiosity, a sense of humility, the strength to challenge the status quo, and the willingness to share...including the willingness to relinquish privilege, resources, and power.³

For enthusiasts, conversation is an art, one of the great pleasures of life, even the basis of civilized society.⁴

Real conversation catches fire. It involves more than sending and receiving information....

The kind of conversation I’m interested in is one in which you start with a willingness to emerge a slightly different person. It is always an experiment, whose results are never guaranteed. It involves risk. It’s an adventure in which we agree to cook the world together and make it taste less bitter....

Conversation is a meeting of minds with different memories and habits. When minds meet, they don’t just exchange facts: they transform them, reshape them, draw different implications from them, engage in new trains of thought. Conversation doesn’t just reshuffle the cards; it creates new cards....⁵

¹ Seth Godin’s blog, 01-04-09, www.sethgodin.com.
² Proposed in systems thinking and learning organization theory. Read Peter Senge if you haven’t already. See the handout on pages 7 – 9 of this document.
³ Kelly Hurd, Cohort 19, Master of Arts in Philanthropy and Development, Saint Mary’s University of Minnesota. Asking questions is how to stimulate conversation, generate learning, and produce change. That’s part of learning organization theory.
⁴ “The Art of Conversation: Chattering Classes,” The Economist, 12-19-06
⁵ Theodore Zeldin, Conversation: How Talk Can Change Our Lives
Process first… pretty much always…

1. What is process? Why (and when) does it matter?
2. Who are your stakeholders and how do you engage them?
3. What is the nature of conversation and questions? How do we use these in our work and in our lives?
4. How can you and I help organizations (and our profession, sector, community) identify and ask the essential (and cage-rattling) questions? What level of risk are you and I willing and able to take?
5. Identifying (and asking) the essential and cage-rattling questions: the process
   a. Why are people afraid of the cage-rattling questions? To what degree do people fear cage-rattling questions? Or do they resist cage-rattling questions out of fear of the answers?
   b. Why is there so little movement on asking, exploring, answer? Where (and why) is there resistance?

Really big questions

_The greatest menace to progress is not ignorance; it is the illusion of knowledge._\(^6\)

1. How do we plan for any future that might come along? For example:
   a. How do we foresee the unforeseeable – and create organizations that can do the same?
      • _What could we/should we have foreseen – and some do but the rest of us?_
   b. What concerns and alarms do you see in you organization, our field, our sector, our communities, our world?
      • _Think about concern and alarm for a moment. If you were a nuclear power plant, concern would be Three Mile Island. If you were that same plant, alarm would be Chernobyl and Fukushima Daiichi. So what concerns and alarms you in our field, our sector, our communities, and our world?_
   c. How do we handle the turbulence, any turbulence?
      • _The art is in knowing that turbulence might come and looking forward to it, bracing for it and embracing it at the same time. If your plan can only succeed if there is no turbulence at any time, it’s probably not a very good plan (either that or you’re not going anywhere interesting.)_\(^7\)
   d. How do we differentiate between risk and gamble?
      • _In military terms: able to get out versus no way out._

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\(^7\) Seth Godin, [www.sethgodin.com](http://www.sethgodin.com), 12-22-11
How do we anticipate unintended consequences?

How do we anticipate (or recognize) the inconceivable becoming the inevitable?

How do we identify the stop-loss moment? *(Think stock market and military)*

2. How do we avoid being reactionary and be more proactive?

3. How do we promote strategic thinking and incubate innovation?

4. How do we ensure respect for science and facts?

5. How do we develop leaders and the concept of leadership in our organizations? *(And what do we even mean by “leadership”?)*

6. How do we effectively manage in a world with so many external influences?
   a. If we cannot predict our variables in the near future, how do we effectively manage?
   b. Do we believe that a swarm of small things can bring down a big thing with any sort of regularity? If yes, what are the implications? How will we manage?
   c. How can things be done the “right way” without being tightly and centrally controlled?
   d. If our future is based on open networked systems that communicate toward greater effectiveness, are we managing and developing our work toward that end?

7. How do we manage the “participatory revolution” in nonprofit management?
   • *Through various means, e.g., social media, stakeholders now can (and often expect to) participate in decision-making as individuals, within organizations, and at community levels. For example: Consider product design, customer service, governance, organizational systems, the democratization of information, etc.*

For us “advanced” or “senior” or “mature” professionals

8. How do we convey and explain to bosses, boards, and younger staff the everlasting fundamentals of fundraising? Or are there everlasting fundamentals anymore?

9. How do we give back to the next generation, preparing them to be even more successful in our profession?

10. How do we figure out how we need to change and then how do we actually do it?

11. How do we unlearn what has always worked in the past?

12. How do we help build adaptive organizations – and adaptive individuals, too?

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10 “The Participatory Revolution in Nonprofit Management,” Gregory Saxton, [www.nonprofitquarterly.org](http://www.nonprofitquarterly.org), 08-02-12

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More specific questions

Perhaps it’s called “development” because we never find the answer...only questions that lead to more questions.\(^1\)

1. Donor loyalty is the Holy Grail of fund development\(^12\). How do we reconcile that with the trend toward short-term donors and volunteers? How do we achieve the Holy Grail?

2. What is the role of the Internet and e-philanthropy?\(^13\) What is the role of social media\(^14\) in relationship building and fund development? What are the implications of social media and all the attendant gadgets? How can we encourage the appropriate balance? How can we explain the challenges to younger generations?

   • Maggie Jackson writes about the erosion of attention and the coming dark age. Jaron Lanier, the father of virtual reality no less, talks about the lack of humanity in our social media connecting. Sherry Turkle, MIT social scientist, researches the impact of technology on people – like you and me and our neighbors and youth and...

3. What is the role of conversation in nurturing relationships? How do we engage younger fundraisers in these mutually respectful conversations?

4. How can we build intergenerational\(^15\) giving? Our loyal donors are aging. How do we reach and grow the next group of younger loyalists?

5. How can we develop ourselves? How can we help develop professionals in fundraising and in the nonprofit sector? What is “the right stuff” to read and explore? What role should research play in our work?

6. How can we grow philanthropy in the U.S.?\(^16\)

\(^{11}\) Cohort 20, Master of Arts in Philanthropy and Development, Saint Mary’s University of Minnesota

\(^{12}\) Coined by Roger Craver in a January 2009 blog from www.theagitator.net.

\(^{13}\) Check out Ted Hart’s books and free e-news. Ted probably “invented” the term “e-philanthropy.”

\(^{14}\) Visit Pew Research Centers for data about Internet and social media usage in American society. How might this apply to your country? See www.theagitator.net for lots of reporting on social media performance and fundraising. AND, make sure you read these books:

   • Jaron Lanier’s book You Are Not A Gadget: A Manifesto. Lanier is the father of virtual reality, there at the start of the worldwide web and all things Internet. And he is worried about the lack of humanity in social media.

   • Also read Maggie Jackson’s book Distracted: The Erosion of Attention and the Coming Dark Age.

   • Sherry Turkle, Alone Together: Why We Expect More From Technology and Less from Each Other.

   • on the Face-to-Face Book: Why Real Relationships Rule in a Digital Marketplace, Keller and Fay

\(^{15}\) Visit www.millennialdonors.com. Review the research about millennial donors. Read Judith Nichols’ books about generational giving. Then consider differences, e.g., generation, gender, socioeconomic status, race/ethnicity, sexual orientation, sexual identity...all different ways of experiencing life.

About the sector and our society

There appears to be a lack of integrity in our political landscape. It seems that no one with ethics is watching the big picture.
1. What is our role – as individuals and as NGOs – in speaking out about ethics and integrity, poor performance and scandals?
2. What is our role – as individuals and as NGOs – in helping devise good public policy and advocating its adoption?
3. I write about privilege and power in our world – and in philanthropy itself. How do you talk about and respond to these questions?
   a. How are privilege, power, and politics linked among themselves? How are they linked to philanthropy, fund development, and governance? How do privilege and power affect organizational dynamics, fund development, and governance?
   b. How do privilege and power affect civil society and civic capacity?
   c. What does privilege look like? What are different kinds of power and privilege?
   d. What are the implications of not having power?
   e. What is the responsibility of those with power towards those without power?
   f. What is the responsibility of those without power to take power, become empowered?
   g. How might philanthropy serve as a democratizing act, an empowerment tool? Should it? Does this matter?
   h. To what extent do professionals – and those with privilege and power – have an obligation to ask these questions and encourage this kind of conversation?

What questions keep you up at night – and still worry you the next morning?

In conclusion…to finish Bob’s refrain…

Please heed the call
Don’t stand in the doorway
Don’t block up the hall
For he that gets hurt
Will be he who has stalled
There’s a battle outside and it is ragin’
It’ll soon shake your windows and rattle your walls
For the times they are a-changing’

Adrian Sargeant, the top fundraising researcher worldwide hosted a summit in June 2011, asking this very question. I was one of the people invited to attend. Have you read the report? It’s posted on my website; also on Blackbaud and Hartsook websites.

Conversation is a Core Business Practice

“Imagine that ‘the grapevine’ is not a poisonous plant to be cut off at the roots, but a natural source of vitality to be cultivated and nourished…

“Consider…that the most widespread and pervasive learning in your organization may not be happening in training rooms, conference rooms, or boardrooms, but in the cafeteria, hallways, and the café across the street. Imagine that through email exchanges, phone visits and bull sessions with colleagues, people at all levels of the organization are sharing critical business knowledge, exploring underlying assumptions, and creating innovative solutions to key business issues.” [Juanita Brown and David Isaacs, “Conversation as a Core Business Practice,” *The Systems Thinker Newsletter*, Volume 7, Number 10, December 1996-January 1997.]

Consider the following:

1. Informal networks of learning conversations are a key business practice. Create these in your organizations.
2. Communities of practice build social capital – and social capital makes organizations work. Do you see gatherings of UPS trucks? What does that mean to you?
3. Conversation has the power to generate new insight and committed action. “An organization’s results are determined through webs of human commitment, born in webs of human conversations.” (Fernando Flores)
4. Talking catalyzes action! So encourage talking.
5. Innovation happens at the grassroots level as people share common interests, concerns and questions.
6. Promote ongoing conversation through dialogue, the process of collective thinking and generative learning.
7. Conversation is the lifeblood of the new economy. (Alan Webber)
8. Your organization must create physical environments that encourage knowledge-generating conversations.
9. Use the Intranet (but don’t eliminate the face-to-face meetings that are essential to building social capital.)

**David Bohm, physicist: Fragmentation of human thought**

In a rapidly shifting and troubled world, Bohm believed we desperately need a common pool of meaning in order to take coherent action together. We create this common pool of meaning by learning to think together in new ways. Thinking together in new ways happens through conversation and dialogue. (Dialogue is different than discussion. Continue reading.)

**Dialogue (conversation) is different than discussion**18.

<table>
<thead>
<tr>
<th>Dialogue</th>
<th>Discussion</th>
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<tbody>
<tr>
<td>Seeing the <em>whole</em> among the parts</td>
<td>Breaking issues / problems into <em>parts</em></td>
</tr>
<tr>
<td>Seeing <em>connections</em> between the parts</td>
<td>Seeing <em>distinctions</em> between the parts</td>
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<tr>
<td><em>Inquiring</em> into assumptions</td>
<td><em>Justifying</em> / <em>defending</em> assumptions</td>
</tr>
<tr>
<td><em>Learning</em> through inquiry and disclosure</td>
<td><em>Persuading</em>, <em>selling</em>, <em>telling</em></td>
</tr>
<tr>
<td>Creating <em>shared</em> meaning among many possibilities</td>
<td>Gaining agreement on <em>one</em> meaning</td>
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18 From *Dialogue: Rediscover the Transforming Power of Conversation* by Linda Ellinor and Glenna Gerard

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1. **Discussion focuses on advocacy.** I’m sharing my position with you and trying to convince you to sign on. High quality advocacy provides data and explains how you move from these data to your view of the situation.

   **Advocacy**
   - Stating one’s views
   - Describing what I think
   - Disclosing how I feel
   - Expressing my judgments
   - Urging a course of action
   - Giving an order

2. **Inquiry is different than advocacy.** Inquiry focuses on asking meaningful questions. Inquiry seeks information and does not advocate a position. High quality inquiry means seeking the views of others and probing how the others arrived at that view. Encouraging others to challenge your own perspective.

3. **Balancing high quality advocacy and high quality inquiry makes significant learning possible.**

4. **Dialogue focuses on inquiry.** Dialogue is defined as a particular set of conversational practices designed to help create and sustain learning and collaborative partnerships.
   a. See the “whole” of issues: systems thinking
   b. Suspend judgment in order to hear the rationale behind the thinking of others.
   c. Identify and suspend assumptions because assumptions produce judgments.
   d. Unquestioned assumptions hamper listening and learning.
   e. Listen – without resistance – in order to learn
      - Listening to others
      - Listening for your own judgments, assumptions and questions
      - Listening for the collective themes emerging from the dialogue
   f. Release the need for a specific outcome.
   g. Suspend role and status
   h. Respect differences
   i. Share responsibility and leadership for the dialogue process
   j. Speak to the group – to the collective intelligence
   k. Speak when you’re moved to speak
   l. Balance inquiry and advocacy

**Asking questions and creating conversation**
- “Pursuit of knowledge is based on asking questions, questioning answers, and asking the right questions in the first place.” [Karla A. Williams, ACFRE and Simone P. Joyaux, ACFRE]
- “Unity, like so many good things, is good only in moderation.” [Jane Jacobs, *Dark Age Ahead*]
- In a Board meeting at General Motors, Alfred Sloan said about an important decision: “I take it that everyone is in basic agreement about this decision?” Everyone nodded yes. Sloan replied, “Then I suggest we postpone the decision. Until we have some disagreement, we don’t understand the problem.”
- Don’t be too congenial! Dysfunctional politeness is bad! See the article below, from *The Roanoke Times*, 2005, by Camille Wright Miller: “A Culture of Congeniality Cannot Achieve Greatness”
  The author quotes a corporate executive who says: “We need more rabble-rousers. We need more people who cause a stir and make noise when we are making the wrong decisions.” But the author wonders if, deep down, if such people are really welcome.
  The author mentions a colleague serving on a board. The colleague notes “Unless those at the top are willing to listen to tough questions and work on the tougher answers, it’s like spitting in the wind – with a mouthful of food.” The colleague has currently concluded that this board, like so many others with which she is acquainted, is an emperor with no clothes!
The article continues: “Unless [the colleague] stays in place, asks the tough questions, demands the even tougher-to-arrive-at-answers, there’s little hope of emperors – boards, associations, corporations or organizations – ever being fully clothed or achieving greatness. “Sometimes I wonder if the culture of congeniality is a culture that cannot ever achieve greatness. The answer…a culture of congeniality – or one of avoidance – cannot achieve greatness. A culture where tough questions are asked, tougher answers are provided honestly and the hardest truths examined closely, provided that culture is deeply embedded in a culture of civility and respect, appears to be the only way to achieve greatness.

Granted, not everyone is in the position to feel comfortable speaking freely; however, for those who are, those who can, those who should, every tough question that remains unasked creates another barrier to reaching fullest potential.”

I paraphrased/adapted the following questions from a great little book: 75 Cage-Rattling Questions to Change the Way You Work by Dick Whitney and Melissa Giovagnoli, McGraw Hill.

1. What’s happening? Who cares? What does it matter? What can be done about it? (Some things that are happening do not matter!)
2. What is most important for your nonprofit / NGO to talk about and why?
3. What change – if made in your nonprofit / NGO – would enhance the organization?
4. What skill – if you acquired it – would enhance your nonprofit / NGO?
5. What idea would get you fired? Promoted?
6. What idea seems impossible – but if executed well – would dramatically change your nonprofit / NGO?
7. What would you do if you knew you could not fail?
8. What incremental activities would produce momentum and the momentum in turn would move your nonprofit / NGO forward?
9. What can you / your nonprofit / NGO be the best in the world at – and what can you not be best at?
10. What is the key economic factor that best drives your economic engine?
11. What are your key people passionate about?
Planning for any future that could come along
Using questions. Applying different lenses. Monitoring the environment.

1. Exploring issues from various vantage points: think big and think small.
   - How useful are the various vantage points below? How can these vantage points
     guide information gathering, create conversation, build a stronger nonprofit?
   - How can you use these concepts to explore issues from various vantage points?
     How can you use these concepts to build a nonprofit that can effectively prepare
     for any possible future?
   - Foreseeing and preparing. Anticipating and preventing. Intervening and fixing.
     When is it worth it – or not?
   a. Paying attention to gradually and suddenly
      i. How do you lose value? Gradually: What are you missing? Which
         opportunities? Which problems? And suddenly you notice, usually too late.
      ii. How do we see the gradual to avoid the sudden? Gradually is actually the
          only think we can do something about.
   b. Foreseeing the unforeseeable
      i. What issues – in our local and global environments – might we have
         anticipated as governments, nonprofits and corporations? How?
      ii. What might be “unforeseeable” – in the nonprofit sector; in the external
         environment; for your nonprofit – but we must foresee to remain strong
         and effective?
      iii. What will you do in your organization to help foresee the unforeseeable?
   c. Anticipating unintended consequences
      - How effectively does your nonprofit identify unintended consequences
        now? How can your nonprofit improve this?
   d. Imagining that the inconceivable becomes inevitable
      i. What are examples of this in society? In the NGO sector? In your NGO?
      ii. What makes something that was once inconceivable become inevitable?
         How does this happen?
      iii. To what degree is this inevitability a result of a, b, c, and d above?

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19 Seth Godin’s blog, Friday, January 17, 2014, “Gradually and then suddenly.”
e. “A form whose end is discernible (if not imminent.)”
   i. Rather like “inconceivable and inevitable.” But different…

f. **Distinguishing between concern and alarm**
   i. If you’re a nuclear power plant, Three Mile Island is concern. Fukushima Daichii is alarm.
   ii. What criteria can your nonprofit use to distinguish between concern and alarm?

g. **Differentiating between risk and gamble**
   i. The military describes risk as having a way out. But gamble? There’s no way out.
   ii. How do we create shared understanding of risk and gamble within nonprofits?
   iii. What criteria can your nonprofit use to differentiate between risk and gamble?
   iv. What is a good process to effectively manage risk and avoid a gamble?
   v. How does an organization identify the stop-loss moment?

h. **Using disruption, intentional or not**
   i. What is disruption? How can we use it – intentionally – to stimulate change?
   ii. What is the distinction between change and disruptive change?
   iii. To what degree – in what ways – is disruption essential to change?
   iv. Is that the best we can do? The better question: “What resources would enable us to do even better?”
      i. How can we do better? What will it take? Is the ROI sufficient?
      ii. And if we cannot do better – and no one can help us do so – then what?

2. **How do we effectively manage in this world?** Exploring questions raised in the article “External Influences on Nonprofit Management,”
   www.nonprofitquarterly.org.
   a. If we cannot predict our variables in the near future…how do we effectively manage?
   b. Do we believe that a swarm of small things can bring down a big thing with any sort of regularity? If yes, what are the implications? How will we manage?
   c. How can things be done “the right way” without being tightly and centrally controlled?
   d. If our future is based on open networked systems that communicate toward greater effectiveness, are we managing and developing our work toward that end?

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21 From Seth Godin’s blog of 01-23-14. His response to “Is that the best we can do?” No! The answer is always “no.” Obviously, the better question is, “What resource would enable us to do even better?” And, Seth concludes: “When the cost of the resource (time, people, money, freedom, boundary easing) is worth the benefit, then sure, go for it. If you can’t make it better, hire someone who can.”
3. **Why would we say “no?”** Seth Godin said it so well: “If you believe that you must keep your promises, over deliver and treat every commitment as though it’s an opportunity for a transformation, the only way you can do this is to turn down most opportunities.

“No I can't meet with you, no I can't sell it to you at this price, no I can't do this job justice, no I can't come to your party, no I can't help you. I'm sorry, but no, I can't. Not if I want to do the very things that people value my work for.

“No is the foundation that we can build our ‘yes’ on.”

22 Seth Godin’s blog of 05-13-14.

4. **How do we recruit and develop appropriate staff and board members?**
   a. What are the attitudes, behaviors, and skills we need within our organization?
   b. How do build capability and capacity and institutionalize this thinking and approach?
   c. How do we define leadership and how do we develop it?

5. **In summary: preparing for any future that could come along**
   a. How do we avoid being reactionary and be more proactive?
   b. How do we move from strategic planning to incubating innovation?
   c. How do we decide – and what are the criteria for determining – the key leverage points for action for the next several years? What is the rate of risk or gamble for each leverage point?
Some of my favorite resource materials  What do you read? Give me tips.

My greatest personal and professional growth comes from reading outside of fundraising and beyond the nonprofit sector.

1. Great blogs and websites
   b. The Agitator (Roger Craver and Tom Belford), www.theagitator.net.
   g. And for personal, face-to-face solicitation: Laura Fredricks, Andrea Kihlstedt, and this website, www.askingmatters.com.

2. Follow and read the various research and books by Adrian Sargeant and Jen Shang.

3. I read these publications regularly. (electronic and print)
   a. The Chronicle of Philanthropy (Particularly the reports on research. Then I go to the original source and read – and collect and file – the full research.)


5. Some of my favorite “non-fundraising” books
   a. Ariely, Dan: The (Honest) Truth About Dishonesty: How We Lie to Everyone – Especially Ourselves
   b. Godin, Seth: Permission Marketing, Tribes, The Big Moo, Linchpin
   c. Goleman, Daniel: Emotional Intelligence and Social Intelligence (See some of this in Strategic Fund Development: Building Profitable Relationships That Last.)
   d. Heath, Chip and Dan: Switch and Decisive
   e. Keller and Fay: The Face-to-Face Book: Why Real Relationships Rule in a Digital Marketplace
   f. Iyengar, Sheena: The Art of Choosing
   g. Jackson, Maggie: Distracted: The Erosion of Attention and the Coming Dark Age
   h. Turkle, Sherry: Alone Together: Why We Expect More from Technology and Less from Each Other. This is the 3rd in a trilogy of books about technology and humanity.