

Cathy: Welcome to, It Doesn't Hurt to Ask. A podcast where we talk about fundraising. This season we'll be talking to shift disturbers in philanthropy. People who are shaking up traditional philanthropy practices. Simone Joyaux has been shift disturbing in philanthropy since 1975 and celebrated her 32nd anniversary as a fundraising consultant in January of 2019. Simone was my teacher at Saint Mary's when I did my masters, later in life, and we had lots of fun debating issues in class. I can't wait to see what this conversation is like.

New Speaker: Simone Joyaux, I'm so delighted to welcome you to It Doesn't Hurt to Ask podcast.

Simone: Well, I'm excited about this too.

New Speaker: I'm really looking forward to talking shift about philanthropy with you.

Simone: Exactly, exactly.

New Speaker: So I was delighted when you agreed to be a guest on this show because I bang on quite a lot about social change philanthropy and I see you really as being the the grand dame of social philanthropy, which I think is appropriate because you speak French and you're a grand dame.

Simone: Merci Beaucoup (Thank you very much)

Cathy: So I love social change philanthropy. It's what gets me excited about being involved in philanthropy. But not everybody really understands what that term means. So why don't we start by you telling us what you think social change philanthropy is.

Simone: So what I think it is is the choice on behalf of the donor, of course, and the choice on behalf of an organization to go to the root causes of things. And so to try to intervene there. Okay. And I think that it's interesting because I find it funny that you would think of me as the grande dame of this sort of thing because I always think of you as one of the people that I was impressed with who did that and um, kind of helped me. I'm serious on my journey. And I think what happened was, you know, I've been, I mean I'm known as somebody in traditional philanthropy and I love, I began with arts organizations and I love arts organizations and I'm want money to go there and I want money to go to the environment and everywhere, everywhere. But I started to begin to be really uncomfortable with the, okay, that's all fine and dandy, but we're not going to the real cause of some problem. So in 2000 for example, I've founded the women's Fund of Rhode Island, which was all about leveling the playing field.

New Speaker: Okay.

Simone: So it's about going back and saying, oh, it's not good enough as far as I'm concerned.

New Speaker: Yeah.

Simone: To save the drowning babies or whatever. Yes. We have to have that kind of philanthropy. We have to, but to keep putting on things forever and not going to the root cause makes me deeply sad and deeply angry. So when I think of social change, the concept is we're trying to change society or the rules, et Cetera, et cetera. And we do that by looking at the situation and saying, what's causing this? Because we can't just compensate for it.

New Speaker: So I have a colleague or a friend, Rosemary, all of her from Amnesty International who said, "I don't want to create a world with better conditions. I want to create a better world."

Simone: Yes. Very nice. Very nice. I mean, I always keep saying to people, it's your choice. I mean philanthropy's voluntary action for the common good. So if you, whoever the you is want desperately to have more theater and more cutting edge theater, then by Golly, give your money there. That's an aspiration you want to fulfill. I'm not here to say, "Oh, you should give to this instead of that". It's the very same thing. If you say, well, you know, I had a scholarship to go to university and I want that available for other people. I certainly hope people are giving money for health care changes. And I'm thinking about like, could we eliminate cancer? Wouldn't that be wonderful? Right? Let's always remember as we keep saying the starving millions, but see, I don't want to just give money to the food pantry and the homeless shelter. I want to pay people a living wage and all that sort of stuff. And I, so I think we need both. And I feel like the history of philanthropy, if you're not reading a specifically social change, social justice book, it never talks about that sort of thing, in regular philanthropy.

New Speaker: We've known each other for a number of years, but I went back to school later in life and did my masters at Saint Mary's where you teach. And it was interesting to me that a lot of the books that we were given to read, not so much in your course, but in some of the other courses, it was all traditional philanthropy. There was no, it was like social change philanthropy didn't exist. And in fact I remember on one course raising the issue because I had decided when I went in that what I wanted to do was really just think and talk about nothing but social change philanthropy for any of the assignments that right then I was going to do and the research that I was going to do. And so in one course I said, so how would what you're talking about be done differently if you were working in social change versus traditional philanthropy? And I got blank stares.

Simone: I wrote this piece called philanthropy's moral dilemma and like back in 2006 or something like that. And the whole point was, I think there are in essence, two kinds of philanthropy. There's the, you know, I want to go to the head of the river and stop whoever's throwing the babies in the river.

New Speaker: Right.

Simone: As opposed to going to rescue the babies from the river.

New Speaker: Right. And you're referring to a, a really common story that's told in, in the social justice sector around somebody sees babies floating in the river, it goes and gets them, fishes

them out, somebody else comes along. So he runs to the headwater and tries to figure out why babies are in there in the first place. Yeah.

Simone: So to me it's, we need both.

New Speaker: Yeah.

Simone: And so when I made the decision, sort of like, I'm going to start integrating both in everything, I do, everything, I present, everything I write or teach. So it's can be something as simple as I want our history of philanthropy and fundraising to talk about both. I want people to choose to rescue the babies. I want them to, you know, give to stop cancer, all those sorts of things. But I also want other people to say, and I've chosen to do a lot of this. I'm not going to rescue the babies because there's bunches of you doing it. Thank heavens. I'm going to the head of the river to figure out who the hell is throwing them in. And my goal is to stop them.

New Speaker: Right. I really love what you said there because I think that oftentimes when I have discussions about social change philanthropy, there's this sense that it is either or, and the truth is that in most organizations that are doing social change philanthropy, you can't not engage in some traditional philanthropy.

Simone: Right.

New Speaker: And the, it's not like the practices are different. It's just how you apply them are different.

Simone: Right. And I really think that this is, I think somebody just short term thinking as in we've got to rescue the trees now. Yes we do. We have to rescue the animals now. But if we also don't go back and figure out why all of this is happening, we won't ever be able to stop it. So some of it's short term thinking. We have an immediate need to rescue the babies to et Cetera, et cetera. I also think a huge part of this is what we will not talk about out loud. And I'm watching it in a program I'm doing right now where you know, we can't talk about political things.

New Speaker: Mm.

Simone: So first there's the, Oh dear, we'll get in trouble with government, but in fact, no we won't. You'll just can't endorse a candidate. But you can say that the laws terrible.

New Speaker: Right

Simone: I mean, and the biggest reason I believe why we don't want to talk about this stuff is because remember Bob? Big Bob?

New Speaker: Bob?

Simone: I'm just using any name. Big Bob.

New Speaker: Oh yeah, Big bob. Big bad Bob.

Simone: Yes. Well, but we are, so just right now he's only big Bob and he has, you know, he's got these, the head of the largest company in Ontario.

New Speaker: Okay.

Simone: And in addition, he serves on everybody's board and his connections are just, and big Bob, you know doesn't really want to get into any controversial things. And remember, he's our largest donor and we just don't dare. I once had a client, a CEO of a family service organization, say to me that always amuses him, that his donors give money to compensate for, to serve people who those very donors and board members are screwing in their businesses.

New Speaker: Well, yeah, I mean there is something to be said for one of the challenges of social change philanthropy is that people with wealth may have a vested interest in not supporting change that is going to impact their ability to maintain their wealth.

Simone: Yes. And even if it's not even that it's so then they not necessarily even consciously, sometimes I think donors saying, well this, will really hurt my business. I think what the, there is a discomfort because then we end up on some level we have to end up talking about race and gender identity in some of those things.

New Speaker: Well and I think that uh, it's in some cases it's not even so much that we have to talk about those uncomfortable topics. Although yes, that is part of it. I don't even think it's necessarily that nefarious. Sometimes it's just really hard to make the case for social change because when you're making the case for traditional philanthropy, it's this employed relationship that we have with a donor where we say to the donor, if you invest x here, the differences, we're going to make her hear the year, the impact you're going to be able to help us achieve in social change you have to say to a donor, well, if you invest x, we're going to try a whole bunch of things. Maybe they'll work, maybe they won't work and we're not even necessarily going to be able to report back to you to say that your money was the thing that made the difference because there's so many variables that influence social change.

Simone: Right. So the timespan is different, the measures are different. The immediate gratification of I did this, right? It's all, it's all different and it's questioning fundamental beliefs and biases we all have.

New Speaker: Well, I think I also want to bring it back to that notion of trying to, you know, invite people to support social change philanthropy and the timeline being so long. Part of the challenge is the timeline is long. We know a lot of things about philanthropy and that kind of instant gratification and the, the paradigm that we work in right now is very entrenched. And so donors have learned that as a paradigm as well as professionals. And so part of the challenge is how do we engage donors differently in the philanthropic process, and we don't have rules for that right now when we don't have, we don't have or have best practices for that right now. We don't have a lot of precedents. So I think

we have a lot of learning to do about how do we deliver these messages about social change philanthropy differently in such a way that they will engage people and inspire people to want to get involved.

Simone: Talk about interesting possible research. Okay.

New Speaker: Any students listening or any researchers out there listening?

Simone: Yes, exactly. So here we are, we get a tax deduction, but we also know from research that most people are not giving money in any country for a tax deduction.

New Speaker: Right

Simone: That's just not a priority. It's like at the lowest. So what is the story we tell? So we were really good at the C three stories, but the C four stories, so in the US C four the gift is not tax deductible.

New Speaker: Okay. So that's a nonprofit here. Just a general run of the mill. Non profit.

Simone: Okay right.

New Speaker: Yeah.

Simone: And one of the things C fours can do as a subset, right. So they can endorse advocate for legislation. Alright.

Cathy: Yeah.

Simone: But in addition they can also set up a political action committee where they endorse candidates. Say now I have seen over the years organizations who do C three work and are hugely popular. Yeah. You know everybody else giving to them okay. At this, this cause to do the program angle.

Cathy: Yeah.

Simone: Those seem everybody's who are giving to that cause.

Cathy: Yeah.

Simone: For the program C3 tax deductible angle don't give to the C Four or the political action angle. Now granted those are, so it's not tax deductible, but really you can't tell me those people wouldn't give. I'm more interested in what is the story we're forgetting to tell them. What is the gap between understanding that in many cases.

Cathy: Can I just say so it's interesting as you're saying that I'm reflecting on a conversation I had with someone who worked in the world of food banking and the organization was also trying to do some social change kind of activities. And she said it was so much

easier to engage donors to give to the food bank because people understood what that meant. Right. And it was much more difficult to engage them in this longer term strategic stuff that they were trying to do. And so I think there's some great, wonderful research out there and when you do it, please let me know whoever ends up doing this.

Simone: Well because it's like, okay, so here's the food bank, but we also are trying to train you to get a job and we get a living wage. And so I've watched in the United States where there are towns, cities, states trying to get living wage laws through, which would then reduce the need for food bank.

Cathy: Yeah, same story. We had a living wage pilot program in Ontario that was recently ended.

Simone: Well, so in my, there it is, is the politics, the public policy stops. Yeah. The other stuff.

Cathy: Yeah. So it's interesting you say that because one of the challenges that has as I see it is that many organizations working in the realm of social change are small. We're in this fragmented sector.

Simone: Absolutely.

Cathy: So we have the sector that is trying to address some of the most intractable social issues is small and fragmented, which means it does not have a voice at the table where the big kids are trying to change policy. And so we're tasked with some of the most difficult work but not being engaged to, uh, suggest solutions or if we're being engaged and suggest solutions were being ignored a lot of the time or they're not, somehow they're not being heard.

Simone: So it begs a whole bunch of questions, it seems to me. So if there are bunches of different organizations working on, let's say food insecurity, so your the big behemoth. Yup. I'm the smaller organization. What are the power dynamics between our organizations?

Cathy: Yup.

Simone: Cause you just cause there's that, right? Yeah.

Cathy: Even what are perceived as being the big behemoth. And some of these sectors are pretty small.

Simone: Yes. I know they're the big player, but, but they're already small sizes anyway, right? Yeah. And so then we're not necessarily very good at collaborating sometimes. So we make things worse by not opening up and saying, okay, everybody who's dealing with this issue, let's get together, let's create a collaborative model. Let's, and then, and then I can't tell you the number of organizations, and I'm sure you've encountered this where you're doing a workshop and someone is just founded an organization, right? And it's like, sounds like a really cool organization except you know that there are three others

that are doing the very same thing. And I've actually asked those people not in public but, you know, during the break saying, so what kind of research did you know that there's this A, B and C group? And they said, no. Yeah. So now we have, instead of two really solid groups making shirts, have a different color. We've got the red shirt people, the yellow shirt people, the blue shirt people.

Cathy: Because of what you said about we're not great at collaborating. I will just give a shout out to episode one of it doesn't hurt to ask podcasts with Sharon Avery where she talks about a model that the Toronto Foundation has experimenting with around just that collective fundraising.

Simone: That's wonderful. Yeah. So collaboration and services. To what degree can we do collective fund raising, etc. Etc.

Cathy: Yeah. Yeah. I think that it's going to be a really important next stage for the world of philanthropy. And I actually think that organizations engaged in social change philanthropy are well positioned to be leaders in this notion of collective fundraising.

Simone: Yes. Because one would hope that they're already collectively working on the issues.

Cathy: Yes. And they do mean having worked in that sector for so many years, I know that so many of these groups are already collaborating behind the scenes quietly. I used to work for a literacy organization. I remember, uh, a funder bringing me and, uh, some other literacy organizations to the table and thought she was doing a really great thing and said, we really want you to collaborate more. And we said, well, we're already collaborating. I mean, we're running our programs at their library and the library is doing this. Like we're all interconnected and in this world.

Simone: And the funder didn't know that.

Cathy: Yeah. And it's, you know, it's not the funders area of expertise, but I, yeah. I think that we already collaborate. So why not take it one step further and figure out how to be leaders in philanthropy. Collaboration. Yeah. I love that. So earlier you talked about having written something about philanthropy's moral dilemma. I took note of that so that I could come back to it. What, tell, tell me about that.

Simone: So it's available in my, um, free download Library, but it's the final chapter of keep your donors.

Cathy: Yup.

Simone: Published in 2008. Um, the time of, and I wrote together. And so it was this whole thinking I was doing about the way we talk about fundraising, which, you know, helps us produce philanthropy, fundraising and boards and all these things. And I had just read or re-read Peggy McIntosh's work, the invisible knapsack on white privilege. And so I started thinking about it. So here's philanthropy. You know, this voluntary action for the common good and we're trying to do all these good things. And then we use words like

major gifts and major donors, which means there are minor gifts and minor donors. You can't say major without meaning that there's minor or less than.

Cathy: Right. I can hear the eye rolling among some of the listeners right now.

Simone: I know, I know

Cathy: And only so I'll play devil's advocate and ask you then. If the terminology is exclusive, so and it, and it is, yes. Then what can we use that makes it inclusive? That still allows practitioners to focus on larger donations because we know from all of the research and just experience that larger donations help us do more things. Right?

Simone: Yes. But you walked into the trap.

Cathy: I was set up that way. Okay.

Simone: So the research shows also that the largest gift any person makes is a gift in their will. Okay. And the research shows the gifts in the will are given by loyal donors who may have been giving you 50 bucks for 10 years. And then because they love you so much, they'd even give, it's in the will.

Cathy: So what about, you know there's this new breed of super philanthropists or whatever you want to call them, who are making these very significant gifts. And those of us who work in capital campaigns know that the math has just such that you need to secure number of six and potentially seven figure gifts in order to move. It was really ambitious goal.

Simone: Just wish we wouldn't call the major donors because it means there are minor donors. And I've actually heard donors say, well, so it said the major gift officer, and I don't know who to call because I don't think I'm a major donor. So I mean again, any suggestions for terminology changes? Oh, I was thinking about this the other day and I was going down bigger, less bigger, moderately bigger. But that seemed sort of inefficient. And it's also hierarchical. So my biggest point is even if we keep using that language, we need to be nurturing relationships with everyone. Yes, of course we're going to spend more or less time in certain areas. I just don't think it should be. And I don't think it's smart for it to be, well, the only criteria we're going to use for attention is how much they gave. Because again, that takes care of this largest single gift I'm ever going to give, which could be in my will and you don't recognize me for my loyalty.

Cathy: Yeah.

Simone: All you do is put it under big gifts or little gifts. You don't have a good donor newsletter that goes to everyone. You're not treating me well. So anyway. Yeah.

Cathy: Well, so it's interesting because I'm, I've been working with a client recently and we've been having this conversation and it's almost like there's a belief that if what we call major donors are treated differently in terms of stewardship, that somehow the other



donors within the organization will not be treated at all. And it's not either or, you know, it doesn't, it shouldn't be either. Or to your point, good stewardship program, right. Reaches out to all donors and the business case make sense to perhaps spend a different kind of energy on donors who can give you larger donations.

Simone: Right. So you know there it can't be mutually exclusive, right? I mean that's the key point. You can't say, well, I'm not going to do a donor newsletter and because my boss won't let me because we don't have enough money and we'll meet with our 10 top donors so they don't need a newsletter. Well that's really cool except for the top donor who doesn't ever want to meet and so now not getting any kind of communications that tells you how you're spending her money. And then the donor who has no children and has been giving 50 bucks a year for 10 years, but very rarely gets any kind of anything. Even a special thank you letter and it's like thinking, okay, well then I'll just leave my money someplace else so that there are minimal things that have to be done with everyone regardless of gift size.

Cathy: Right.

Simone: That to say that only big donors get to be invited to the special post play party. And so the person who's been giving you 20 bucks for a year, for every month for a decade isn't going to be invited. So let's not be so restrictive in our thinking and let's test our thinking about how we would feel if we were talked about that way. So that's one part of philanthropy's moral dilemma. Okay.

Cathy: I do think that we as a sector have an opportunity to be more thoughtful about language and, and I will also give you an example of calling donors prospects. And this story comes from a colleague who told me a story about referring to prospects and there was a prospective donor in the room who was quite offended and they found out about it afterwards. They're not prospects or prospective donors. Yes. Oh yeah. So, uh, you know, I think there is, there's something to be said for us and I know that it's shorthand that, and it's language that we all understand, but it language is important. Yes. And we need to think about what it means if our donors here is speaking that way.

Simone: So when I think about philanthropy's moral dilemma, there is the language we use. Sometimes the way we behave towards the larger donors and the not so large donors without concern for their engagement. It's the money piece, which is the way our society works is it's all about money. Then think about board members. And so who do we recruit for board members? Well, you know, people with more money who can give more money, who have connections, they can get more money. So of course, first of all, that's not the point of a board, nor is it the point of board members only. So this just shows that we need a little bit more work on governance.

Cathy: So when you say it's not the point of a board, would you say that fundraising is an important responsibility of the board?

Simone: Let me, so you see your few fallen into my trap. You're using board and board member interchangeably.

Cathy: Okay.

Simone: So we recruit people to serve as board members and those board members all together in a room do governance.

Cathy: Okay.

Simone: So when they're in the room and as a group, they're not, they can't fundraise. We're at a board meeting. What am I gonna do? I'm the board chair. When I hit three, I want you to all start fundraising.

Cathy: Okay.

Simone: Okay. So x, in fact, the single most important thing a board member does is go to board meetings and participate in the conversations in order to make governance decisions.

Cathy: Yeah.

Simone: Now, as far as I'm concerned, the performance expectations of board members are all the same. Number one, attend board meetings. Come prepared, having read the material so you can have a strategic, meaningful conversation and make the right decisions as a group. Okay. To give a personal financial contribution to the best of your personal ability every single year to support general operations. And if we do a special campaign, like a capital campaign, you have to give to that too. And it's, your gift has to be unrestricted.

Cathy: Yeah, yeah, I love that

Simone: What I hear all the time is it's all about bigger gifts, bigger donors. It's people who have the connections to then go ask their friends for a gift, which is such a silly idea. Okay. So Cathy, my favorite charity is a Planned Parenthood. And, and, and uh, you're my dearest friend and I have to sell some tickets to the event. I know you hate events. Okay. But I just need you to buy the tickets. Okay.

Cathy: Yeah.

Simone: And then I'd also like a gift. Um, and don't forget that, you know, um, you asked me for a gift for your pay favorite charity, the opera, you know, and you know, I don't like opera, but I gave a gift because we're friends right now. Both of us can hardly wait until the other one isn't on the board. Yeah. We're not interested in giving you don't trespass on personal and professional relationships. You identify those you think might be interested and then you introduced them to the charity. So the moral dilemma I see is as a, say again, we want people who can give us big gifts. We want people who will get their big gift friends and the president of the other bank. You know, cause you're the president of this bank, but the other bank, you know, you'd golf with her or whatever and then we're going to get a gift for them. So we've even made our boards be all about money and the size of money and the connections. So I think of those as a moral

dilemma when philanthropy is supposed to be about voluntary action for the common good, and we're supposed to respect people no matter how much money they have, as far as I'm concerned. And we get board members on the board for other things other than money and connections, we want their expertise in certain areas to contribute to the conversation.

Cathy: Sure. So I believe it was Carver who was, who said that one of his biggest regrets was that he didn't say that board members really need to be hands on engaged in fundraising. And so I use fundraising right deliberately instead of philanthropy. So in your model where this is philanthropies moral dilemma, where does that notion of board members being engaged in fundraising sit?

Simone: Well in my performance expectations for board members, as I said at 10 board meetings. Yeah. Come prepared, have the conversation, give a personal financial contribution. Unrestricted.

Cathy: Yep.

Simone: Every year to the personal, which to the extent of your personal ability.

Cathy: Yeah.

Simone: Then I have a commitment form where they have to sign up for things they will do in fundraising and then they will be graciously nagged to death by the development officer and the chair of the Development Committee and the board sheriff necessary to do it. So for example, make thank you calls.

Cathy: Right. Okay.

Simone: Donor thank you calls, serve on an event committee. I beg any board I sit on, I will to everything. Everything. Please don't make me sit on the event committee, but I won't ask for gifts. I'll say with you,

Cathy: You don't like events, do you?

Simone: No, I don't. And so I say that and usually cause I'll do everything else.

Cathy: Yeah.

Simone: They say, okay, you don't have to be on. Yeah. One time they said no, we need you on the event committee too. And I said, okay, fine. And I pouted so anyway, yeah, no, I think board members should be involved in relationship building, fundraising, identifying potential candidates for future board membership and committee membership. Absolutely. And as I say, I have a frigging form and they have to sign it and turn it in

Cathy: Just in case you're hearing that Simone is picking up a piece of paper. That's how she's pretending as a form. She's just ripped it.

Simone: And I believe development officers are nags, gracious, lovely nags.

Cathy: Gracious and lovely. I think that's important. Yeah. Yeah. Okay. Any last thoughts on moral dilemmas that you want to, um, or should we move on to the next topic?

Simone: Let's move on to topic.

Cathy: All right. One of the things we had talked about prior to the recording started was this notion of professionalism. Okay. So I think we, I think the nonprofit sector is not sufficiently respected.

Simone: Yeah. I think that fundraising is not sufficiently respected.

Cathy: And so before we go on, do you have wise to why we're not sufficient already respected?

Simone: Uh, so I think that one of the reasons we're not sufficiently respected is because it's fundraising is something that evolves by people doing it.

Cathy: Yeah.

Simone: And then writing books about it. I mean, think about it. I didn't go to school to be a fundraiser.

Cathy: Yep.

Simone: And did you go to school to be a fundraiser?

Cathy: No.

Simone: No. So I mean, I went to school to be a public school teacher, you know, so because there is no, or was no, back in the olden days degree program or even masters program in fundraising, philanthropy, nonprofits, whatever. Now there's lots of them. And so we learned by doing, but we learned by passing down information from other people, other people who were marvelous and wonderful. Heck, then you and I became some of the people passing down stuff through books, articles, podcasts, etc. So are my understanding of the concept of a profession is that there is a body of knowledge and there's a lot of research. Okay. And then there's some sort of certification and we have the CFRE and that sort of thing. But we've never had as much academic knowledge as I think we should have.

Cathy: Right.

Simone: And I'm not even talking about whether you have to go to school in order to get a job. I'm not saying that. I'm saying that now we know with neuroscience and behavioral economics and philanthropic psychology now, because we have our first person in that, that we can hold ourselves up to saying there is academic.

Cathy: Yup.

Simone: Knowledge, not just practice knowledge. Yeah. And to me that's good. And one of the biggest reasons why, well, there's two big reasons why it's good.

Cathy: Yeah.

Simone: Number one, I think we would be better at our jobs.

Cathy: If we had more research.

Simone: Yes. And if we had more academic knowledge as fundraisers, I think we could be better at our jobs.

Cathy: Right. So two, one thing about that is that even though there is now a much bigger body of knowledge out there of academic research out there, the piece that's still missing is access for practitioners. So it's still really hard to wade through or a to find it and be to wade through it if it's a big treatise.

Simone: So we actually need really good writers to take the academics writing and translate it. And that's a really important thing. You know this is the sort of stuff we need to be learning, application of an academic lens through things which is operating as a slightly different level than a practitioner level.

Cathy: So that's really important. And you didn't present it AFP, Toronto's Congress last year, they rested you. But one of the things that I was invited to do was become the first chair of the, of the first research track. So we incorporated academic research into the fundraising conference and had some conversations about what does it mean to be research. And I really wanted to make sure that it was, that we were inviting people who could present academic research that was peer reviewed, that was robustly academic. So we're starting, there's a little shift disturbing thing.

Simone: That's good.

Cathy: That we've done. And I hope, I hope others will take up that mantle and do it at their own conferences.

Simone: Absolutely. And then the other thing which I hear, and you may hear this all the time as a consultant, is no, I'm not reading the stuff. I don't have time.

Cathy: Well, yeah, I mean, and that's the thing, like some of the research is really dense and hard to,

Simone: I'm not yet talking about that.

Cathy: Oh, okay. What are you talking about?

Simone: I'm talking about our sector and all kinds of people I know working in the sector saying we're small nonprofits, we don't have time to read that. There was a piece of, um, there was an article several years ago in the chronicle of philanthropy in the US.

Cathy: Yeah.

Simone: Where they had done, they were comparing fundraising research and consumer research and that consumer research is being done and read and applied by for-profits and has for forever. Right?

Cathy: Yeah.

Simone: But that comparing nonprofits with the, for profits, we are sector doesn't read the stuff. Oh. And the conclusion of the article was this is problematic. And in the talk back like people, you know, writing comments. One guy said something like, we don't have time to read things because we're small organizations and we have to do the work. And it's like, oh great, I want a fundraiser. Just like I want my medical doctor to not stay on top of thing, not sat on top of stuff. I mean it's, that's not what a professional does. Yeah. So a professional in anything including grass cutting knows the next new product. So anyway, so I want to think about a profession.

Cathy: Yeah.

Simone: I'm disappointed that we don't make room for our own learning and that we don't start pushing back at organizations saying, you either give me some time to read or I'm not working for you. Now that right there however, is an unearned privilege comment because it means that whoever's saying that can earn enough money, that they can take that risk. And I'm, I'm aware of that. I just think we there, I mean, I know too many people who say this, but I gotta tell ya professionals, okay. Yup. People who define themselves as professionals, and I'm not using that word lightly. People who define themselves as professionals aren't caught up in, I only read 300 word things. I only this, I only that.

Cathy: So you've made me think of something though. Simone, if people aren't being treated like professional or no perceived as professionals and the organizations they work for, then they don't necessarily have that same level of motivation to, to be reading the research. Right?

Simone: So which comes first? The chicken or the egg, you know, so I want to be in a position I wanted to be when I was a staff person, I want to be able to say, well, the research says, or according to experts. Okay.

Cathy: Yup. Well, I guess all the more reason for us to be delivering research and even best practices in multiple different ways, right? I mean I think that one of the things that lots of people we know do is they take time to go to conferences. The reason that we're talking today is because tomorrow we're both speaking at a conference and we know that people have taken the time, they're going to take a day off work and they go to conferences. So if we're thinking about how we help the sector, then this notion of incorporating research into the conference material that we're delivering is, is a way to do that.

Simone: Right. Well, you know, to a large degree, some of this is about, you know, do you choose as an individual to be a lifelong learner?

Cathy: And listen to podcast

Simone: Precisely.

Cathy: So I also remember being early in my career and working in small shops and I felt like I didn't have time to read. Well, also early in my career there wasn't as much to read, let's be honest. Right? 25 years ago, uh, there wasn't that much research, um, uh, about fundraising. But I think back to my best boss ever and what she did too, I don't know if she knows she did this, but what she did to support me in, um, my professional development and one of the things was that she provided me with time. Do my CFRE and, and the most important piece of that was that, you know, I don't, I don't know what it's like now, but at the time there was a reading list of about a dozen books or something. And, and I remember reading those dozen books. And what I will say is that, that that was a huge shift for me because I went from being a fundraiser who knew how to do a number of discrete tasks within the world of fundraising. And it kind of galvanized for me this knowledge where I began to recognize that fundraising was not just a bunch of discrete tasks. And so I think it's important and maybe this is something that we should be talking about more. It's like what can leaders do to support professionals early in their careers, read and learn and, and access research that's said there.

Simone: Yeah. I think that's a really good point, man. I think it kind of starts with the concept of lifelong learning. Whether it's, you know, instead of only, there's an old story about only ordering, um, vanilla ice cream and lifelong learners might try something other than vanilla.

Cathy: Yeah.

Simone: Just to see, right. Or you try this, you try that. Um, I mean it's the exploration of life if you will. And I think you're right about an interesting question is to what degree, in what ways do we do the leaders of anything? Oh, two subsequent people.

Cathy: Yep.

Simone: And so how do we do that? And different people will do it different ways. Some people choose to say, well, if I go and present at conferences, I'll be able to help someone on, some people do a blog or a newsletter or podcast with the idea that they're introducing thoughts to people and then saying, well sure you could go read this book about that or whatever. Um, everybody learns in different ways. So then conference attendance, you know, workshop, attendance and, and you, you know, you, you went to a 75 minute conference presentation and got two interesting ideas that then at some point, a few months later, you looked up on the internet and found three articles and one was by somebody that you actually kind of knew. And so then you email them.

Cathy: Right. So this brings up something really interesting. So, Anne, my trusty podcast producer, um, often teaches me things in ways that I never could have imagined. So I was on a podcast, I will plug it the Brain Trust podcast. And, uh, there were three or four of us speaking and we were talking about, it might've been about research and the lack of research and, and, um, and we were, we're all kind of complaining about it. And then afterwards Anne said to me, it's kind of weird to me that like four leaders in the industry were complaining about something and not talking about how to fix it. And I thought, yeah, we do have a responsibility to do something about this stuff. We can't just complain about it.

Simone: So it, I mean, we could ask the trustee Anne yeah. And any number of other people, like, so what do you want? What do you need? I mean, how many senior fundraisers or whatever you want to call this mentor somebody?

Cathy: Mm. Yeah.

Simone: How many, how many people get tons and tons of emails from everywhere and anywhere around the world who aren't trying to hire you as a consultant or whatever. But you give them a bunch of free advice and you spent 30 minutes responding to an email, um, or two hours talking on the telephone. Um, and I will bet you that bunches of senior fundraisers or senior CEOs or whatever, I'll bet bunches of them do it I guess.

Cathy: Yeah. Well, I like that. I mean, I think that if you're listening to this and you're a leader, I hope that you will think about what your going to do to address some of the issues that we've been talking about or issues that you feel strongly about that we haven't talked about today. And how are you going to be part of the solution. We'll Simone, this has been a well, a wide ranging conversation. Thank you so much. I'm delighted that you are in Toronto and that we got to do this podcast face to face. I always knew that I wanted you to be one of the guests and when we had an opportunity to do it in person, um, I jumped at it.

Simone: Well, I'm thrilled that you asked me and I, I love the, a shift changing kinds of things. And, um, we need to be really candid, I think sometimes and push the envelope.

Cathy: I agree. And it was fun to talk shift with you.

Simone: Well it was wonderful talking shift for you.



Cathy: I say that as many times as I can.

Simone: Yes, I miss you. I miss you.

Cathy: Oh, thank you. That's sweet. That was a wide ranging conversation with some great topics and a little bit of debate thrown in there for good measure. If you liked what you heard, I hope you will subscribe. You can do it on iTunes, Google play or stitcher. Make sure that you give us a rating and feel free to leave us a comment, as my mama used to say, it doesn't hurt to ask. The great music that you hear on this podcast is Dog Days by Isaac Joel. This podcast is produced by poodle party productions. Good girl, Brandy and Cathy Mann and associates.