Andrew Olsen: Hi, welcome. This is Andrew Olsen with the Rainmaker Fundraising Podcast. I'm here with my good friend and cohost Roy Jones. Hey, Roy. Good afternoon.

Roy Jones: Hey, good seeing you. I'm excited about this broadcast, Andrew. We're getting ready to talk to a guy that has, over the last 10 or 15 years, worked at every level in the development process. I mean, from a Donor Relations Manager to a Program Director to now a Director of Development. And I just love meeting folks and talking to folks that are well-rounded, have been able to roll up their sleeves at multiple levels, and make this stuff happen.

Andrew Olsen: Yeah, I couldn't agree more. And I'm excited for this to be our first podcast of 2020, because not only are we going to talk development, but we're going to talk leadership and how that impacts philanthropy. And so I'm really excited to introduce Adam Morgan here. Adam is the Senior Director of Development at Phi Kappa PSI Foundation. He's a former chapter author of the Giving USA Report, and also authored two chapters in my book 101 Biggest Mistakes Nonprofits Make and How You Can Avoid Them. And so, Adam, welcome to the show.

Adam Morgan: Andrew, Roy, thanks very much for having me. I'm excited to be here.

Andrew Olsen: Glad you're here, man. So let's jump right into it. The first thing I want to talk to you about, in your chapter on leadership, you give an example of ... you talk about an organization that has a great mission, great programs, but they really can't ever kind of launch and scale philanthropically. And you compare that to an organization that might have mediocre messaging, sort of floundering program maybe, but they're killing it in fundraising. And you say that leadership is the difference. Talk to us about that.

Adam Morgan: Well, I think it's important for us in the fundraising and the development sector to understand we're all leaders, right? We all have a boss. We all have an Executive Director, a Director of Development, a Board Chair. We have people who are in leadership positions, but especially those frontline fundraisers, they're all leaders. Their donors look to them. Their program staff looks to them. The organization looks to them to be out there. They're raising money and communicating the mission, communicating the vision, communicating the need, doing all those things you need to raise money. And so the good people in leadership positions that I've seen ... and maybe their mission isn't the best mission or maybe they're one of many organizations in an area who have a similar type of mission. The ones who empower their staff to go out there and be their own leaders are the ones who I've seen be some of the most successful fundraising organizations out there. Giving their guys the tools, the guys and gals the tools, the freedom, the flexibility, to do whatever it is that is needed to be done.

Andrew Olsen: So it sounds like what you're saying is the leaders who are willing to empower their people and not necessarily need to hold the reigns tight-

Adam Morgan: Exactly.

Andrew Olsen: ... tend to be more successful. Is that what you're saying?

Adam Morgan: Yeah, exactly. I mean, a lot of us have worked and do work for small shops. And we know the work gets spread around and everyone has to pitch in and do a little bit of everything. But letting some of that organizational management stuff, the administrative stuff, giving that to the administrative and the organizational people and letting the fundraisers go out there and fundraise. I think we have a lot of a tendency to ask our fundraisers to do a lot, and we all have small budgets, and so we all ask them to do their own bookkeeping, expense reports, mileage requests, time off, all those sorts of things. But when you add up sort of where a fundraiser's time is best spent, it's out there communicating and connecting with donors. And so allowing them to do that.

Roy Jones: It really is interesting when we have a great major gift fundraiser that so often we try to push her into a management role. And we probably lose money doing that. But it's interesting. I hadn't thought about that before, but it really is a challenge for the industry isn't it?

Adam Morgan: Yeah, exactly. I mean, I've had some colleagues and peers who were, like you said, were stellar individual Major Gifts Officers. And then because they ... society or their career path dictate, oh, you should now become a Director of Major Gifts. You should lead a team, you should do this, you should do that. They step into a management role, and through no fault of their own, because they're not bad people, it's not that they don't try, but we either don't train them to be in that new role or we expect them to also carry their 100 person major gifts caseload and now manage a team of five or six Major Gifts Officers. We have to look at where that line is and give the proper support where it's needed.

Andrew Olsen: Or if we're being honest, their 500 to a 1,000 person caseload, that we might see in some organizations, right?

Adam Morgan: Yeah, totally.

Andrew Olsen: So something else you talked about in a chapter, you said that ... you're talking about leaders who are more successful when they're willing to admit that they don't know something. And I feel like that's something we run into quite a lot. And it's certainly not something that's unique to the nonprofit sector. It's human nature, right? That for some people it's just harder to admit when they don't know than others. Talk to us about what your experience has been related to that issue and how you see it impacting someone's ability to lead an organization.

Adam Morgan: Yeah. And this was something that was really hard for me to learn personally, because as a new leader and a new manager you want to be seen as having all the right answers. And I think it actually took me getting married and spending time with my wife and her asking me a question and then wanting to seem like I knew what I was talking about and giving the wrong answer. And then that wrong answer can you lead you down a bad road. And you quickly realize that, man, this would have been a lot easier if I just said, "You know, I don't know, but give me five minutes to google it." So organizationally I've been enrolled in and worked with and been a part of organizations where I've seen that sort of instance multiply, have a multiplier effect.

And that on the small scale you just lose time. You ask a question to your supervisor or somebody and then you get an answer, and then because it's given to you by a person of authority, a person that you trust or a person who, frankly, you just have to listen to because they're your boss, then you go out and execute on it and then you find out that it's wrong. As a fundraiser you can lose face, significant face, by telling a donor, a major gift donor or planning gift donor, the wrong answer to a question. And then having to go back and walk that back, that's an opportunity to lose trust, to lose face, to lose support. And in the grander scale, I think if this is a pattern that you're seeing with your supervisor or someone and you continuously get the wrong information from them, and not just, oh, I got this date wrong, it was really the next day, but big stuff, it starts to erode the organizational culture a little bit.

I've seen that relationship turn really bad because then there's trust loss internally. But externally you're still trying to portray a united front. You're still trying to fundraise for a mission that you probably care deeply about. And so then it becomes personal in nature, because I think a lot of the best fundraisers do fundraise for organizations that they're passionate about. So, it can be become a slippery slope, I think.

Andrew Olsen: Yeah. And I think it's interesting, we have a saying that we like to banter around that the way you experience someone inside your organization is exactly the way that someone outside is going to experience them. Right? This myth that you can be two different people is just not true. Right?

Adam Morgan: Sure.

Andrew Olsen: So if we have this tendency to want to be seen as knowing everything and not ever being wrong, and that leads us to the place of making incorrect statements and giving answers that are wrong, not only does that erode the culture internally, but I think to your point, it stands to really set a risk of eroding trust with donors, with other institutional funders, with partners in the community. I mean, it really could set you up for failure. I'm curious, how do we avoid that?

Adam Morgan: Well, the only thing I'll say before we get to that question is I've even seen Gift Officers feel the need to portray to a donor that they know everything, which it can also be just as dangerous. Because I think more you get into major gifts and you work with some experienced donors, donors realize that, well, the fundraisers know a lot about the organization. They don't know everything. And so it's okay to say, "I don't know that. Or let me ask our program expert. Let me ask the expert on it and get back to you." Or maybe even set up a meet. Take that it's a chance to set up a meeting with those experts.

So, but how do we avoid it? I think, like I mentioned for me, it was a trial by fire, and some of that is going to be the case. But having the self-awareness to maybe take a step back and say, "It's okay to not know everything." I mean, I certainly don't expect my boss to know everything in the world. And so why would they expect to know that of themselves? So I think it starts with a little bit of self-reflection and a little bit of personal awareness, being able to take a step back and see and just pause on things and take an extra minute to think about them.

Andrew Olsen: So, Roy, I'm curious to get your perspective on this. When you think about C-level executives that you've coached and engaged with, that can be a hard conversation for a more junior person, a frontline fundraiser who reports to an Executive Director to have. To really, as gently as possible, call them on the fact that hey, we have to behave differently in this respect and we can't just take the position that we're always all knowing. What's your experience there and what do you recommend?

Roy Jones: Yeah, I mean Adam's exactly right. I mean, it really is about transparency. And I have found as well, now you're talking to an old man here who will turn 61 years old here in a few weeks, and I have found that, especially dealing with younger people. I've got three sons that are millennials, and so often in the work environment we forget about just how these different age groups process. And and I fall into the trap of thinking I'm dealing with people that process like I do for my generation. And it's so often the people that are really hitting their stride in the fundraising development world, start doing it in their 30s and 40s, and 20 years my junior. And I have found I get a lot more by asking questions, getting their opinion before I give mine.

And I don't want to call it a millennium challenge. Everybody's always dumping on the millennials, but it is part of our marketplace and it is part of ... you talk about frontline fundraisers, I mean, for the most part, a lot of millennials are in that space right now. And in finding ways to communicate with them that allow them to have input, direction, and provide you their thoughts is really, really important. And it's common sense in a lot of respects, but for some old salty dogs like me, it's taken me a bit to learn that.

Andrew Olsen: I think you're going to need a tee shirt that says old salty dog. I think that would be fitting. Just saying you might get that for Christmas next year.

Adam Morgan: Well, no, Roy, that's a great point. One of the things ... I've studied a lot ... I was never in the military but I studied a lot of military leadership and military history, and one of the lessons I picked up from those studies was if you've got a group, a military group, around and they've got to come to a decision and they're asking for opinions, one of the things I've learned is they'll often start with the most junior person there and ask what their opinion is, and then go up from there.

And so that way they get sort of an unbiased opinion from the bottom up instead of starting ... and I think a lot of times what we do and some other cultures do is we start with the top and we ask, "What's the Executive Director's opinion? What's the Board Chair's opinion? What's the Director of Development's opinion?" And a lot of people don't want to contradict that. Right? They don't want to be seen as going against the flow or against the grain. And so they may think like, well, that answer's not right, because I'm the one who's putting together a mail appeal and I know that we're mailing to this segment and not that segment. But they don't want to speak up, either look bad or make their boss look at that.

Roy Jones: Yeah. Group think can really read you astray fast, can't it?

Adam Morgan: Yep.

Andrew Olsen: Yeah. I know Jack Welch, former CEO of General Electric, he used to say, "When I got a problem, I don't want to talk to the Senior Vice President of that division. I want to talk to the guy running the machine. Because he's so close to it, he's going to be able to tell me what the actual problem is." I think that makes a lot of sense. So let's pivot for a second. Let's talk about ... you talk in the chapter about emotional intelligence.

Adam Morgan: Yes. EQ.

Andrew Olsen: And why it's important to leadership, particularly in our sector. Talk to us a little bit about ... I think for the audience give a quick a synopsis of how you see EQ working in a leadership role, and what you've seen related to how people can kind of develop that muscle.

Adam Morgan: Yeah, so I think emotional intelligence, EQ, is very important because it's our ... it's one of the things that creates our ability to interact with others, and to read a social or a personal situation and understand what our response to that situation should be. Did they just make a joke and I should laugh? Or is that a serious comment and I should dig deeper into it to see if they're okay, if everything's okay at home? The whole, maybe this is a millennial thing, but the whole you leave your personal life at home and you go to work really doesn't happen anymore. We're so connected to our house. I mean, we can text with our family all day. We can get emails all day. So we know when something at home is going on, and we'd take that into work.

So that adage, I think, doesn't hold up anymore. So and that's maybe a little bit off of here. But I think EQ is important because it gives a leader that ability to sort of hone in on the personal side of the relationship with their employees and see what's going on in their life. I mean, a leader is more than just a person's boss at work. They're their friend, they're their mentor, they're a confidant, they're a coach, they're a teammate in many respects. So they have all these different roles that go into being a good leader, and being able to understand the social situation, adjust accordingly, read it correctly, I think is all very critical to what leadership is.

Roy Jones: IQ is one thing, but EQ ... just really plugging in. And I found that makes a really good fundraiser as well. If you've got somebody that has the great EQ skills, I mean, they know how to ask questions, they know how to really listen. And those kinds of skills, I believe can be learned. With some people it's innate, but I believe those emotional listening skills can be learned.

Adam Morgan: Yeah. And absolutely. I mean, the book Emotional Intelligence 2.0 is a great resource for that. And it is one of the things they say. You can actively work to increase your EQ over time. Where is your IQ is your IQ, you have it from when you're six or seven on through the rest of your life. But your EQ, you can work on that, you can increase it. So I think that's great.

Roy Jones: Good point. Good point.

Andrew Olsen: Glad we can increase one of them because I'm not sure I got the IQ part. Hey, Adam, you talk about some of the different challenges faced by leaders who are leading in large organizations and small organizations. And I'm curious to know what you think the one or two biggest differences are, but I also want to know what challenges you think they face similarly.

Adam Morgan: It's a great question. So currently I'm at a small organization and directly prior to that I was at a very large organization. And I thought moving to a small organization I would be able to make decisions and decisions would be made more quickly because I ran into this at organizations it takes time to make big decisions. It just takes time to make big decisions. Whether you're at a small organization or a big organization, it just takes time to make big decisions. I mean, you need buy-in from donors and board members and the Executive Director and whoever your partners are on the project. So that doesn't really change. And I thought that was interesting, and makes a lot of sense now that I'm on both sides of it.

I think one of the biggest challenges of small organizations is always going to be the staff issue. At a small shop, a one person, two person, three person shop, there's never going to be enough hands on deck to do everything you want to do. And then you're going to be limited to the skills of who you have. So if you don't have a good copywriter, if you don't have a good editor or a good graphic design person, you're either going to need to find volunteers who could maybe help you in those areas, outsource it if it comes to that. And so those challenges sort of change on a small shop. But I think the personnel thing is always going to be the biggest. You're going to have to work with what you have and you're never going to have enough people to do everything you want to do.

Vice versa, on the big side, well you may have all of these resources. You may have a dedicated graphic designer and a copywriter and all these different things, but you still have to then get all of those people to work together. Because now personalities come into play, other projects come into play. What could be a priority for you as a Major Gift Officer is not necessarily a priority for the Graphic Designer who's working on the invitations for the gala event six weeks, right? So trying to fit all of that together. And now you're talking about workflows and project plans. And so while one side looks at the other and says, "Aw, man, they have it good." Both sides have their challenges. And it's just about how you adapt to that challenge to manage effectively.

Andrew Olsen: Sounds like it's just different shades of craziness, huh?

Adam Morgan: Yeah, absolutely.

Andrew Olsen: The next thing I want to talk about is I just want to get your input on how you see the leader, the senior leader's, role in developing culture in the organization.

Adam Morgan: It's critically important. I think culture is one of those things where it's going to affect every aspect of the organization. From the time you show up to work, I mean physically to the what time you get to work, to how you enjoy your day, to how your fundraisers are out there talking about the organization. I think one of their biggest jobs is to sit back and think strategically about what is our culture? As a nonprofit, do we have a culture of philanthropy? Are we actively promoting a culture of giving back? Not just to ourselves, right? But to our community. Are we taking good care of our people within the best means that we have possible to do?

I think in this day and age with being able to work remotely, the technology that's available, almost every fundraiser I know has a laptop and a tablet and a cell phone and a video camera. There's no reason why fundraisers shouldn't be given, and all employees really, shouldn't be given some of those easy culture fixes to be able to work from home or take care of personal needs as they're able to. Within reason, right? We're not talking about an abuse of someone's goodwill of their system. But I think culture stemming from a senior leader is critically important. If that senior leader is going to send an email at midnight, is it the expectation that they receive a response? Or is it the expectation that hey, this is just how they work, but you don't need to respond until the next day? Same thing with work over the weekend.

Andrew Olsen: So that's really interesting. I'm curious. I've been guilty of that myself. I work weird hours sometimes. I get up pretty early. So it wouldn't be a completely out of the norm for me to be sending emails at say 4:00 in the morning. Right? And I have three little kids, so I take time when I get it. So if I get a little bit of time late at night on a Saturday or mid-day on a Sunday, I might try to crunch through as many things as I can. So I've been very guilty of being that guy who sends out the 12 or 15 emails over the weekend or super early or super late.

As far as sort of setting the tone, what do you think about the idea? I mean, do you think that's something that's essential enough that a conversation should be had with staff that hey, this is how I work because it's most effective for me in the organization, but I don't expect you to do that. And then kind of a second step to that is I wonder what the behavior modifications need to be for the leader to truly live not expecting that from their people.

Adam Morgan: Yeah. No, I mean, I think that's a great question. And like anything else it's going to come down to the culture of the individual organizations. I would say probably not a bad thing to set that expectation and say like, "Hey, I work weird hours. I get up early and I like to knock out my emails first thing when I wake up because I'm spending time with my family and from 6:00 PM to 10:00 PM. And so I'm not looking at stuff. So I'm going to wake up, clear that out, and move on. And I don't expect a response until you're in the office and you're settled." I think that's absolutely reasonable to have.

And then as far as behavior modification, I think going back to technology, we work in a wonderful era now where you can save messages in a draft folder, you can schedule emails to go out at a specific time, so you can use some of the tools that you have. So I think some of it is going to be incumbent on a leader to say like, "Hey, I know if I send Andrew this email at midnight and he's awake, he's going to feel a need to respond to it." So I think to have the conversation with Andrew that's like, "Andrew, I mean, like don't worry about it. Just worry about it when you get to the office or whatever." The same time, or I can say, "Okay, let's schedule this to go at at 6:00 AM or 8:00 AM." So I think there's a give and take there.

Roy Jones: Yeah. I think one of the things I've done ... and of course I have one of these personalities. I'm a former college football offensive lineman, a former college all American heavyweight. I get really loud on the phone. I have clear opinions about things. And I have to remind people, pull people in, listen, you have to confront me. You have to challenge me. There's a right way to do it and a wrong way to do it. But I expect to be challenged. And I have to remind them of that frequently. And I have to remind myself of that. So I have to tone it down. I have to get where they are emotionally and tone wise and all that kind of thing. So it depends on the leader, but you really do have to pull it out of them, and to let them know that you expect to be challenged. And if you're not challenged, that's a problem.

Andrew Olsen: Yeah. And I think, Roy, that's an interesting point you made, because you do this really well. But I think the second step to telling someone that I expect to be challenged is not being defensive when they challenge you. Right?

Roy Jones: That's right.

Andrew Olsen: So I've been in so many scenarios where someone says, "Oh, yeah, challenge me. I want to ... I'm open, blah, blah, blah." And then you go in and you do challenge them, and in a respectful way, and immediately it becomes a defensive posture. And then you get the positioning of, well, I'm the leader and this and that. In the 10 or 15 years we've known each other, I've never experienced you to behave that way. And the team that we work with now, they recognize that, wow, yeah, when Roy says he's open to being challenged, he really is open to being challenged.

But there are so many leaders, I think, who just aren't comfortable enough in their own skin to say those words, and then also to live it out. And I think so that's, for me, I think one of the biggest challenges in this respect is not just saying the words, but how do you live it? How do you live the response? So even the look on your face when someone does challenge something you say doesn't communicate wow, I really didn't want you to say that. I don't have an answer for it. It's just an observation.

Roy Jones: Yeah. No. No. And I think that's right. And it's being a good listener. Coming back to the original point that Adam made is that being transparent, being real, and being the first to admit when you blow it. They need to see that and they need to see you're not perfect and that you have to depend on them. And tell you it makes a big difference when they save your bacon a time or two.

Andrew Olsen: For sure.

Roy Jones: And you really start to build trust that way. You mentioned that military strategy of starting from the lowest ranking officer NGO and soliciting opinions and moving up. And I saw something on the Internet this week, a quote by George S. Patton. "If everyone is thinking alike, then someone is not thinking." And again, we have to remind ourselves of that. Diversity is so important. Not just ethnicity, but diversity of opinion. We're not always going to be right and we're not always going to agree, but the best decisions get made in that kind of diversity.

Andrew Olsen: Yeah, for sure. Hey, Adam, a follow up, next question. Not just around culture setting, but I'm curious to get your point of view on what a leader's role is in philanthropy for an organization. And I ask that, and you probably live this as well, but having worked with over a thousand organizations at this point, I can name off plenty, I won't, but I can know off plenty where the senior most person in the organization says something like, "No, no, no, I don't get involved in that. That's why I hired this guy. That's why I hired her. She does the fundraising." Which I think is really dangerous.

Adam Morgan: Yeah. Totally.

Andrew Olsen: Talk to us about your perspective on that.

Adam Morgan: So it's critically dangerous. I think in the book I say, you've probably heard the saying, everyone is a fundraiser, right? So CEO, Executive Director, board members, to the Administrative Assistant. And I mean that you need to look at it, approach it, from a fundraising mentality. Right? A customer service oriented mentality. Some organizations are going to work with a client base for their programs that are not going to ... these clients are probably not going to eventually become donors. Some organizations are going to work their program base, their client base, probably do have the potential be donors. But we should be treating all of those people the same because we never know who's talking to who. We never know when a donor is going to walk into a program to do an audit and say like, "How you treat your people is indicative of who you are as organization."

So I say that to say that if you're an Executive Director or CEO, fundraising is absolutely part of your job via your job description, because you're in charge of the operational organizational budget for that organization. So wouldn't you want to have your hands on the pulse of some of your top donors or partners or income generating revenue streams, if it's not donations? Through my work with the Lilly School of Philanthropy and Giving USA, we did a lot of research. And you've probably, most of us, have seen those charitable giving reports come out every year. And we see, oh, it's great. Charitable dollars are rising and rising and rising, and we're well over the $400 billion mark. But the flip side of that is that we have less and less donors giving that money. And so on some level our pool of charitable dollars from individuals is shrinking.

And if I'm the leader of an organization, I want to know that my top 50 donors are well taken care of. I want to have personal relationship with them to know that if something happens in their life that we are aware of it, that we're with them, alongside them, on it. That if it changes their ability to contribute to our organization in any given year, we know that as soon as possible. So that from the operational standpoint we can make an adjustment to that. But also so that we can just be a good friend to them, because they have been a good friend to us. And so your frontline fundraisers who have those relationships are great, right? That's where it all needs to start. But it all needs to trickle up to the top, because that's where the last level of accountability is going to be.

And then the other side of it is we've probably all worked with major gift donors who want to have that access. They look at an investment that they're making in an organization, they have a question about a new program, yeah, they don't mind going through their Gift Officer to make a transaction, to get an update, to schedule a meeting. But when push comes to shove, they're going to want to be able to call the top person at the organization, especially if they're connected with the board in some way, and have that opportunity. So for that first call to be a call of crisis or a call need on part of the donor, I don't think is a great way to set yourself up. So having a pulse on that and whatever that looks like. And some people recommend that each C-suite person should carry a small portfolio of donors, and some should just say that they should be involved in the stewardship process. I think a lot of that is just going to depend on the organization and the personalities there. But yeah, it's critical that they're involved in the process.

Roy Jones: That all begins with saying thank you. And, I mean, that's the thing that I try to push across the whole organization is I need you to help me say thank you. You may not need to be the person to make the ask, but you can sure tell people thank you. And demonstrate that the impact they're having with their giving.

Andrew Olsen: Yeah, absolutely.

Roy Jones: Program managers as well as the people you serve. Teaching philanthropy through the whole organization, it's not easy but it absolutely can happen.

Andrew Olsen: All right, man. Hey, I know we're getting close on time, so I got one more question for you before-

Adam Morgan: Sure.

Andrew Olsen: ... we let you go. I've always been, I'll say, frustrated and quite honestly shocked at how few nonprofit have a formalized succession plan in place. And we know it's critical. And there are plenty of examples about it. Talk to us about what you see in that space, why you think it doesn't happen as frequently as it should, and what organizations should be doing to make sure they're prepared there.

Adam Morgan: Yeah, I mean, I think we've all seen studies where ... first of all, we all know turnover in the industry is high among fundraisers. I don't know if it's at 18 months or 24 months now, but still that's a very high turnover rate. And we've all seen the studies about how the loss in revenue that occurs when you lose a fundraiser or someone, now you'll roll that up when you lose your CEO or your Chief Development Officer.

Andrew Olsen: What do you see as the risks of not having a succession plan?

Adam Morgan: Sure.

Andrew Olsen: And what are the first steps an organization can take to get toward it?

Adam Morgan: Yeah, so I think the first step, so I'll start with that first, is just, at the bare minimum, having one for your Chief Officer and your Board President. Because an illness can happen, a job opportunity can happen, something that can happen that's totally unforeseen, and in no a way is meant at any poor reflection of anything, but things happen, right? It's life. And so having a succession plan for those top two individuals, your Board President and your Chief Executive, whether it's ... whatever that looks like. And keeping it up to date for each person. We've seen things where a transition happens and you dust out the succession plan and it's got an old Board President's name on it and old Executive Director's name on it. And that's no good anymore. So I think that, at the very least, mitigates the top end of the risk. And then the other risks are if you don't have them for Gift Officers, for Development Directors, you risk loss of revenue.

And this is equally on the program side. If you run a program and you don't have a plan in place for if a Program Director or a critical component of that program runs away ... if you have a soup kitchen in your cook leaves, how are you feeding people the next day? A lot of us rely on temp organizations for administrative support when that happens, but there's not really ... I guess there are some organizations out there that do that at a director level, but knowing who you have on your roster and your organization and what roles they can come into. More importantly, being proactive with some of those people and saying, "What roles do you want to go into? How can we help you grow into these roles?" Making them proactively a part of that succession plan, is, I think, a great way to keep retention in the organization.

Because if you have someone, if you are an Executive Director, a Development Director, and retirement's on your horizon, or a job change is on your horizon, frankly, in the next few years, there's no harm in talking to your team about, "Where do you want to go with your career? What do you want to do? Would you be interested in this role or the next role or what does that look like?" I think most people, maybe not some millennials, joking, most people have the expectation that it takes a few years to get there and that as long as they know they're in consideration, back to this transparency thing, as long as they know what their options are, as long as you're honest with them about what their options are, they'll be a lot likely to stick around and see where that goes.

Andrew Olsen: Yeah, that makes a lot of sense. It's interesting. I remember when I was working on the front lines of the fundraiser, we used to have a rule, I guess you could say, that we wanted to have, at least every one of the top 100 donors, we wanted them to have a three deep relationship with the organization. So whoever their assigned fundraiser was, plus somebody in the C-suite, plus ideally a board member or a high level of volunteer. I don't know. Roy, did you guys have that kind of a system set up anywhere?

Roy Jones: We do. And it's hard for people to agree with it until they see it. But you can never thank a donor too much. And it's not unusual in the programs I've been involved in that a donor, especially somebody that's making a five figure gift or larger, they're going to get thanks six or seven times in lots of different ways. And so, so often we think, "Oh, we can't have more than one person contacting the donor." And that's just a mistake. Now, if we had seven people all making asks, yeah, that would be a mistake. But-

Andrew Olsen: And I'm sure it happens in some orgs.

Roy Jones: But just loving on people, man, you cannot do too much of that.

Andrew Olsen: Yeah, absolutely. Hey, Adam, appreciate you being here to talk with us about leadership and philanthropy.

Adam Morgan: Thank you, gentlemen.

Andrew Olsen: Appreciate your contribution to the book. If somebody wants to reach out to you after listening to this podcast, what's the best way for them to get in touch with you?

Adam Morgan: I'm on LinkedIn, and my email is A-M-O-R-G005@gmail.com it's amorg005@gmail.com, or Adam Morgan on LinkedIn. I'm pretty easy to find.

Andrew Olsen: Awesome, man. Thanks again for being here.

Adam Morgan: Thanks, guys.

Roy Jones: Thank you.