



Fundraising Locally and Globally with David Sherman
Season 1, Episode 2

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Transcript

Speaker 1 (00:00):

Welcome to Asking for Good a podcast for people who want to make a difference, hear stories from seasoned nonprofit professionals and volunteers on how to begin or further a career in making the world a better place.

Katie Pooser (00:14):

Hello, I'm Katie. Pooser a career fundraiser committed to making the nonprofit sector better. Today. We're talking with David Sherman, he's worked for some of the most iconic nonprofits out there at the local regional and global levels. He's going to talk about how he became the executive director at big brothers, big sisters mountain region, and share the story of a major gift. He secured while working for a national nonprofit gift supported the national office as well as 10 local nonprofits. David Sherman has more than 20 years of experience serving a variety of leadership fund development and program capacities for national, regional, and local nonprofits, including big brothers, big sisters of America, feeding America. Girls can else of the USA and Kansas big brothers, big sisters. Welcome to asking for good David where we talk to real nonprofit fundraisers about their impact.

David Sherman (01:10):

Thank you, Katie. It's so great to be here.

Katie Pooser (01:12):

It's great to have you another part of your biography that is very worth sharing. And I think is part of what I've seeing. The work that you do is, is reflected in an award that you received the national big brothers, big sisters, skip Walsh executive of the year award. You're currently an executive director at a big brothers, big sisters, and we'd love to know how did you find this role?

David Sherman (01:41):

I actually came a upon the role in, in, in a very roundabout way. So it, came full circle. So initially I was interested in being a nonprofit executive director. And the first position I took

was in fund development. I was fortunate enough to, to have a mentor in the person who hired me and he, he knew of my interest in becoming a nonprofit executive. And so was very careful to make sure I saw all aspects of the program, everything from board relationships to fund development, major giving grant, writing human resources, but I really struggled between, I knew I wanted to make a difference, but I didn't know how I wanted to make a difference. And so I spent a lot of my career on, on executive teams doing fundraising first at the local level, and then Kansas big brothers. We actually started very local.

David Sherman (02:34):

We were a county program and we saw other counties that had the same need. And so we grew to a regional position. And in that I really got excited about scale and the opportunity to make a difference at a larger level. And that's what got me to working first with big brothers, big sisters of America and then feeding America and girl Scouts of the USA really looking at, can you make a, a bigger difference and a bigger impact? And what I found in doing that is that, well, yes, you can. I mean, you can talk about seven figure and eight figure grants versus, you know, 10,000 and a hundred thousand dollars grants or donor asks and so forth. But the challenge there is I've, wasn't getting that what that feel that I needed. I wasn't seeing those stories. I wasn't interacting with the people we were helping and making a difference with. And so that's where I was very fortunate in seeing this position open up and was, was able to return to my roots, which has been kind of the, the mountain west and and, and mentoring and big brothers, big sisters.

Katie Pooser (03:42):

I liked your idea about, you know, you've had the chance to work at regional and local nonprofits, and you had the chance to work at scale at global and national nonprofits. And I think you hit on a really important point that you see said you lost the connection with the programming, and you knew that that's what would motivate you to keep working hard for the cause mm-hmm <affirmative>. And I think that's a very self-aware thing to notice where in the, in the ecosystem of a nonprofit, do you need to be, to be satisfied with your work?

David Sherman (04:21):

Yeah, exactly. And it, and it's all about finding what, what works for you, because obviously every person is, is different. And, and it's a part of, of the journey I've taken in really figuring out what is, what is my personal mission statement? What is it that I want to get out of my life and out of the service that I'm involved with. And, and to me that's a really key and essential part. And I, I found, I, it really, it wasn't any one moment, but I just saw that after working, you know, 20 years almost, I think it was 18 years at Kansas, big brothers, big sisters. All of a sudden I was in this pattern that a lot of development people find

themselves in of every year and a half, every two years finding a new job. And I was thinking, what, what am I missing here? And, and it was that it was that direct connection. And I was finding that missing in my life too incidentally as my, my relationships with family and friends. And so that was part of this whole return to, you know, I'm in Santa Fe now, which is six hours from Denver, where I grew up. And I just feel a lot more centered and connected, which allows me to work more, more efficiently and to make a difference at a, at a level that, that makes sense for me.

Katie Pooser (05:38):

That's great. Well, you told us that you started at Kansas big brothers, big sisters, and had a great mentor who helped you learn about the different types of development and the different parts of the organization. One thing that I missed that I'd love for you to talk to us a little bit more about is what made you decide to apply for your first nonprofit job? How did you enter this sector?

David Sherman (06:05):

I graduated college and with a degree in political science and economics, and what do you do when you have a degree in political science and economics, you go to law law school. So I applied to several law schools, got accepted to university of Denver and found myself a a week in facing \$30,000 a year in loans, which I'm sure now it's probably double that. And I was like, I don't want to be an attorney. There's a problem here. Why am I, why am I doing this? And I couldn't find myself, I couldn't motivate myself to study. So I actually went and sought out a career counselor. He could have called himself a career psychologist because you did a lot of, of behavioral type work, a lot of introspection. And what's important to you, what you value.

David Sherman (06:59):

A lot of testing. And I decided that I, I always knew I wanted to do something that would make a difference. And I always knew that I wanted to do something where I could innovate where I could, you know, use my skill sets. But I had never thought about applying those together and doing it, you know that, that work working for a nonprofit. And that's what we came on was nonprofit leadership. And so right out of the gate, you know, being young and a little bit naive, I applied for an executive director position and you know, first job outta college and I did position, but I left a good enough and prep with the interviewers and with the CEO who interviewed me that I got offered a fundraising position. And that's, that's where we started. So a week later, I'm in a smokey bowling alley with towels begging these league bowlers to participate in a bowl for kid's sake fundraiser. And

Katie Pooser (07:55):

Let's talk about a gift that perhaps ties part of your story together. You are a person who knows nonprofits at a regional and local level, you know, nonprofits at scale. So let's talk about a gift that would illustrate both of those concepts.

David Sherman (08:13):

Absolutely. I have one specific one that comes to mind and it not necessarily the, the largest gift or are, are necessarily the most impactful, but a, a, a very important relationship that I was proud of developing, but also just found fascinating. And this was a, a couple, the husband is actually, or was a well-known hedge fund manager. I won't mention names, but if you've seen the big short, you, you, you know, part of his story and the wife was founder and, and director of a local children's nonprofit that was involved with medical research, both just, just brilliant people. I was a little bit intimidated by the husband at first because of his unique blend and background, right. He he's brilliant. He, he has this economics background. I can talk economics, but, you know, he had a PhD in it and also just had this medical knowledge because of the interest in his, his wife's foundation.

David Sherman (09:08):

And I knew right off the bat there, not that you should ever fake it. And I would never say fake it with the dough owner, but you're not gonna be able to fake. You're not gonna get anything by him. He's gonna have questions about all of your research, what, you know, what is it validated? How is it validated? I mean, really into the weeds on stuff. So, but, but on the other hand we knew that they're both compassionate, but his wife really had a desire for the stories of change and how, how their investment was gonna impact others. And so going into that, we put together a strategy where, where we worked with them over a series of meetings first off to make sure we understood how they wanted their investment made and how they wanted their dollars to be best used.

David Sherman (09:54):

And, and, and it was, they wanted to get, get out of being a donor to our organization. But also understanding how we can put that together and put something in action that, that they're proud of, that they know that they made a difference, but that also for us is actually making an impact. And so we had our first meeting over, over drink, and it was just me listening and trying to understand exactly what it was. There was this term that the donor kept using that he wanted to donate at the margins. And it was like, okay, what, what do you mean by, at the margins? I mean, because that, that even in the economics world, that can mean different things. And we really found that what he, he was looking for is to invest where if, if his investment wasn't made, if their investment wasn't made, no one at all would be hoped.

David Sherman (10:47):

But by making this investment, you know, we're not gonna change the world, but we're gonna, we're gonna allow you to reach a lot of people in a small way. So that could be a, providing some sort of, some form of capital in the food world. You know, it could be a food trip that, you know, that was distributing food. It could be an investment in training or resources, something that allows that organization to take the next step up. And so what we were able to, so we talked about that, then we had a dinner and I came back with a proposal. And what we decided to do is we looked at 10 different member organizations and each one, their impact was a little bit different, but, but we showed with graphs how this investment would've allow us to serve this many more families and children with that. I also passed on an invitation to attend one of our research conferences. And so that was our third meeting was, was kind of closing the deal over breakfast before the conference began. So we were able to do that and we were able this was an example where at a national level, we were able to impact multiple communities through a, through a gift at, at the margins. How

Katie Pooser (12:07):

Did you find this donor or how did you know that they would be open to this first conversation to talk about making a gift at the margins or a catalytic gift?

David Sherman (12:19):

Right. So, and in this one, I, I mean in prospect research is always critical, but this, this, this one actually came about through relationships with our member organizations and they had been contributing on a local level. And, and so that's how we, we first received awareness of, of the couple and just asked for an introductory meeting and had also read about some of their giving. And, and they actually had a, a foundation that they gave through. So it really was, was, was that entry level. And then conversation over the phone leads to a meeting in person leads to, you know, eventually a gift. And like you said, it's always worked in the process. Yeah. Was, it was a long process, definitely 18 months or more, which,

Katie Pooser (13:09):

Wow. But you could tell that you were making progress during that 18 months.

David Sherman (13:15):

Yes. Yeah, absolutely. You, you knew you were making progress. I, I think the, the thing we underestimate is that people who are in, in philanthropy, they understand the cycle as well as we do. And so I never felt like I was being misled and it it's, it's almost like a dance. I mean, they knew the next step and I knew that that was the next step. And like I said, it was a team effort too. It wasn't just me. It's bringing in our program team, our research team,

and just making sure that they have the confidence and trust to, to make a gift at the level that they're capable, capable

Katie Pooser (13:55):

Of giving. I'm thinking about the backgrounds of the husband and wife in this story. Mm-Hmm <affirmative>, the husband is in finance. The wife is working in medical related nonprofit work. And I'm wondering if, as you were having these meetings, was there ever a point where you would have package the same concept or same message in different ways for, to accommodate their work styles or personalities?

David Sherman (14:25):

Yeah, a little bit, but it was the, the dynamic between the couple was interesting because they, I, I mean, they were used to this and, and it would be more, it was subtle, but it would almost like a handoff. So if I was talking again, if I was talking about how need X amount of dollars, and it will, will be able to serve Y number of children, you know, then I'd be talking with the husband. And then as soon as I start talking about the social determinants of health, you know, then that would pull in the wife. And so it was just kind of this back and forth like that. I mean, they were both engaged fully, but you could tell which topic of conversation would be most appealing to each one. And I should say, I mean, just as a side note before managing the nonprofit, the, the wife, she actually worked for NASA or one of the space agencies. So she had also had kind of that kind of math brain or whatever you wanna call it. Right,

Katie Pooser (15:26):

Right. Yeah. Yeah. That the analytical, analytical

David Sherman (15:29):

Wasn't afraid and I'm analytical. So I think, I think in determining who stewarded the, these donors, there was probably some intentionality in that too, as I look back on it because we could have assigned other staff to the relationship.

Katie Pooser (15:42):

That's a really great point too. And I've certainly experienced situations where the don't just clicks much better with another staff person. Mm-Hmm <affirmative>, that is actually one of my big tips is to make sure that your donor has a few different relationships in the organization in case one that staff member needs to move on for some reason, or needs to be called onto other projects, or, or maybe you'll find that you have a better connection to another staff member. So we shouldn't own these donor relationships

David Sherman (16:20):

That is such a critical point. And that's something that's been reinforced in the position. I, I took two and a half years ago. I learned real fast, which donors were donors to the agency and which donors were donors to my predecessor because she had been here for 18 years and was phenomenal for people that were giving to her, not to the mission. And I think it's my job coming in to convert them to donors of, of the agency, but it wasn't always possible. And so as much as you can, you know, get away from all ownership of the relationship at the individual level and more at the agency level is critical.

Katie Pooser (17:00):

So I think this is really my last question about this specific ask, as you were preparing your proposal and ask, were you considering how the donor would be telling their friends and family about this gift?

David Sherman (17:18):

Yeah, it's funny. You mentioned that, but I, I totally was. And I was so I remember this moment. In fact, I, in doing my research, I got on the donor's blog. They, they had a blog site and also was I think Twitter was, I think it was Twitter was just starting to gain popularity and, and he would do Twitter posts. And so I kind of modeled the ask after that and had some graphs that kind of resembled graphs he had been posting. And, and, and I kind of in my eye pictured him writing a post on this investment. And I, I never saw that and I'm not gonna say it didn't happen, but I never, never did see that. But there was this moment when we were that third meeting <affirmative>, as we're sitting down and he's looking at it, the graph, and he gives me this look, and it was kind of like a nod of approval. Like, yeah, you're getting this. I could picture, you know, at dinner parties, the wife talking about how they would help 10 different organizations through investments and that it was gonna help children have our meals over the summer. And, you know, just being proud of the, the difference they're making.

Katie Pooser (18:34):

Whenever you talk about reading the donor's blog, I think that's a really critical concept to know, and be aware of as someone new to the field when donors or people publish content, whether it be a, on LinkedIn or their own personal website or in a book absolutely consume it. Absolutely understand it, it's offensive. In fact, if you do the opposite, if you are reticent to take on what they're saying publicly, you know, you just sound out of touch when you talk to them, if you are not up to speed on what they're publicly making available about their thought process.

David Sherman (19:15):

Absolutely. And I remember again, taking it back to program. I remember in my program training way back with big brothers, big sisters, when I first started and the program

director, his answer, when you would go to him with a problem, his would answer the question with the question, have you read the file? And he would say, it's in the file. And same thing. I mean, if you, if you haven't done your research, the, the answers to what the donor's passions are to what they would be most interested in to what motivates them, who it it's all there. And there's so much now, even if they don't have a blog, there's so much you can do through research and finding out about other organizations, they support groups they're involved in, you know, are they passionate about the outdoors? Are they passionate about technology and all sorts of things that you can use as clues and, and, and making your ask tailor made for them? <Affirmative>,

Katie Pooser (20:12):

Let's talk about your role as an executive director and, you know, part of that role is hiring, and I know absolutely most of our listeners are in college or graduate school, or they're considering a career transition into the sector. So as a hiring manager, the talk to us about what you're looking for in a candidate.

David Sherman (20:36):

Yeah. That's great. I'm, I'm looking for kind of a balance, I almost at a unicorn, but I'm really not. <Laugh> it. first and foremost to me are the intangibles, right? You, you can teach anybody about the moves management or the donor cycle. You can't teach someone tenacity. I don't think. Right. So you're looking for is this person a go-getter do they, do they listen actively? Are they professional? Are they passionate? And, and I think the interview setting for me is, is critical with development positions, probably more so than any other position, because it's so similar to the donor relationship. And you're seeing real time how this person interacts and thinks on their feet and builds rapport and, and develops a relationship. And so that's really what I'm looking for more than anything. Our, our, my most recent hire for, for fund development officer my board thought I was not all of them. The ones that met her understood that some of 'em thought I was crazy because she had never had a development position, but she's knocking it outta the park. And it's because of her passion and, and she's bright. And she, she has just outstanding people's skills. And, and I knew that the rest could be, could be trained and, and, and yet, or there,

Katie Pooser (22:10):

Well, given that example, and the fact that you shared that you applied for an executive director job fresh out of undergrad. I think I know the answer, but I'm gonna ask directly, should we be applying for jobs that we are underqualified for, or that we think we're underqualified for?

David Sherman (22:28):

Yeah, I absolutely. And you're right. You probably know the answers. So I think I mean, obviously within reason, right? I mean, I'm not gonna go apply to you know, work for a vet having no experience in, but, but when we're talking about fund development and you're interested in a career and fund development, if you see a position and you don't have the exact qualifications for it, still try and get your foot in the door, apply for it and, and make your case because that's part of networking too. And you know, with, with my example, I didn't get the job, but I did get some valuable experience for first of all. I mean, the, the, the, the interviewing process and writing the application and cover letter, and, you know, all of that is, is the real time experience that you need, but also you know, it led to another opportunity.

David Sherman (23:24):

So but if you're gonna do that, go all in don't. What, what does annoy me as, as a hiring manager is it's so easy now to just get online and click on positions and submit your resume without really having an interest, you've gotta make your case. Your cover letter needs to be specific to the organization. It should bullet out your qualifications, that match what it is that the job post is looking for. And you know, you follow it up with, with a phone call and, and if you get the interview with the you letter, from the

Katie Pooser (24:06):

Person applying for jobs standpoint, how do you find a good organization?

David Sherman (24:11):

You do your research work your network. If you don't have a network, develop your network and trust your gut. And just remember when you're interviewing that, yes, they're interviewing you, but you're interviewing them too. So for me, I'm always looking for, is this mission something I believe in and can get lots of great causes out there. There's no reason to compromise. I'll just use an example for me personally, I after I left feeding America, I actually was offered and initially accepted a job for an organization. Everyone would've heard of if I used their name, their great organization, but their cause which is medical focused. It's just not something I'm passionate about. And fortunately, I determined that as I thought about it before I started the job, but so really think about things that you, you, you can get behind. And that doesn't mean you have to find a forever job, but what's the right fit for you for now. And, and don't compromise on that.

Katie Pooser (25:17):

Many of the professionals I talk to have spent real time and are continually evaluating their personal mission or the purpose for their work and their, you know, personal service. And I wanna know from, from you, you've talked about that a little bit. Are there any

resources or tools or activities that you do that help you yeah. Identify your personal mission or, or, or reconnect with your personal mission?

David Sherman (25:53):

Yeah, and I think reconnect is the key. Right. And, and first off I, when I first heard about person personal mission I won't say I wasn't a fan, but I was like, I made it too hard, I guess. Right, right. I mean, you have your personal mission if you've written a resume or most people do. I mean, you, you have that statement up there that says innovative, hardworking leader who wants to make a difference for youth or whatever. I mean that that's the foundation or the start of your personal mission. So for me, I, I mean, it's, it's not so much a, a, a mission as, as, as knowing what, what drives me and where, and, and what I want to get out of a, a position and out of life. And that's, you know, helping people facing adversity youth, especially and, and knowing that I'm making a difference in the lives of others.

David Sherman (26:51):

So, but what I have found real helpful in that, I mean, there's so many books and, and, and authors out there that write on the topic, but I've, I've really been into a book right now. I'll call it essentialism because something I struggle with is, yes, I wanna make a difference, but how do you focus that? Right. And I think it Gandhi basically talked about you know, shedding everything to focus on one thing and, and so simplifying your life. And, and, and I think there's something about that with your mission statement or, or what it is that your values are, identify those two or three core values, and then use that as a lens for how you view everything else. And don't, don't try and accomplish everything and, and don't get too far out of your lane. If that makes sense,

Katie Pooser (27:48):

It has my wheels turning about a couple of things. I think that's very true in your first fundraising role. Also, it's easy to have a ton of ideas and to get a lot of projects going, or a lot of letters or emails or calls or events. And if you're everywhere, you're nowhere. I think that really applies to your work as well.

David Sherman (28:12):

Yeah. You've gotta kind of figure out how do you quiet the noise? Because so much of what we do day to day is noise. And I mean, it's cliché anymore, but it's the discipline of pursuing less. And, and really there is, I mean, there's no shortage of things you can do. And, and it's all about prioritizing and really focusing on what's going to get you the, the, the gift that you need and the relationships that, that you need for your organization to sustain and flourish.

Katie Pooser (28:44):

Tell me about how diversity, equity and inclusion are part of the work you're doing.

David Sherman (28:49):

We actually, and don't laugh, but we actually call it Jedi, which is justice, equity, diversity, and inclusion. That's great, but that's what it's all about, right. Is we're, you know, social justice is and equity. If there was equity, if there was social justice, you wouldn't need big brothers, big sisters. And, and, and any other youth program you want to want to mention, so who we are, and it's, it's what we do. And it's just having that sincere commitment to, to do our best, to make sure we reflect that, that we're nonjudgmental the, that we're accepting that we're open to change. And one thing we haven't implemented, but that I believe in firmly and that we're working towards is having formalized feedback loops where you're constantly getting like, like I'm ashamed to admit right now, we don't have a, a little or former little on our board. And yet we're all about serving these kids. Why, why don't we have a board member who was a little, or we have a staff member, who's a parent, but we don't have a board member. Who's been a parent in the program, lots of volunteer, but it's just having that voice and making sure that you have the right avenues for those voices to be heard and reflected in the decisions you make day to day.

Katie Pooser (30:11):

Awesome. Well, I would be remiss if I didn't give us one minute here to plug big brothers, big sisters, you and I both have been big brothers and a big sister. I have two former littles that I still am in touch with, and they have celebrated many milestone birthdays, and one is already finished college. That ages me a bit. But yeah, I think that the folks listening to our podcast are those who are, service-minded, service-oriented want to make a difference and maybe looking for a place to volunteer and big brothers, big sisters is all over the us. Yes. I'll hand the mic to you for the pitch. It personally, I think it's a, a fantastic way to get involved in your community to get to know a wonderful person and to, to share all the great things you have to share. So a

David Sherman (31:14):

Absolutely. And you can probably make the pitch better than I, but <laugh>, before I go to that I'll just say, make, make you feel not as old, my first little is approaching 40. Oh,

Katie Pooser (31:27):

Right. <Laugh> and

David Sherman (31:28):

We're still in contact. And I just got, I mean, it was so heartwarming. I got a Facebook message from the a little I had in the school based program. And he said basically, I'll leave out the profanity, but he said, sorry, I was such a jerk, which I never felt he was, he was just a teenager. I want you to know that you kept me from joining a gang, that my brother was recruiting me to. And if it weren't for you, I wouldn't be a father. And wow. Oh yeah. You know, because you don't know, you don't know if you even working in it, you don't know the difference that you're making. But I would say as far as getting involved, if, if you think you don't have time, you do and kids right now.

David Sherman (32:19):

I mean the whole, the last 15 months has been about not have in connection. Right. And we're already talking about kids who are socially isolated, who are behind in school, who don't get exposure to the outdoors. Well, here's a way to make a difference to connect with the kid, tell them that you're there for them. And just, just be there, do things together, get them away from that screen. They've been looking at for 15 hours a day and do something. So yeah, it's a great way to, to make a difference and to feel good about yourself, any final thoughts, you know, follow your heart, follow your you, your gut, you're in this for the right reasons. And I appreciate you, Katie. This, this is great. It's been good to reconnect and you know, we need more people in the, the business of nonprofits. So it's great work and rewarding and much needed and appreciated. So thank you.

Katie Pooser (33:15):

David. I know you're already late to another meeting, so I can't thank you enough for your time and your authentic sincerity through the whole interview.

Speaker 4 (33:28):

Thank you for joining us on Asking for Good. Find us wherever you get your podcast. And please tell a friend take care.