It's a new day for philanthropy, work smarter not harder with Meg George
Season 1, Episode 8

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Transcript

Speaker 1:

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.

Speaker 2:

Hello, I'm Katie. Pooser a career fundraiser committed to making the nonprofit sector better. I'm thrilled today because I'm with Meg, George Meg. George is co-founder of boutique consultancy George philanthropy group. She is a philanthropic strategist whose focus is on high impact, major giving you'll find Meg on both sides of the equation. She is a fundraiser and a philanthropic advisor for donors making charitable gifts. She advises nonprofits across different sectors on relationship centered fundraising. Another key area of her work is advising individuals and families on their personal philanthropy. Often helping them build their own mission statements by working with Meg, their charitable giving is strategic and intentional, which maximizes their philanthropic impact. As a result, her clients find fulfillment in investing in meaningful causes, which generates outcomes welcome Meg to asking for. Good.

Speaker 3:

Thank you, Katie. I'm so honored and excited to be a part of the show. I am so grateful for the chance to speak about this field and two people who are considering it, and we want you to come work in philanthropy. We welcome you. And there are so many people like myself who are willing to have conversations with one of any agent background who really wants to transition into this work. Please don't shy away from it because you have a preconceived notion about how hard it will be or how boring it will be or how little it pays and know that there's this huge kind of shift right now in philanthropy. And there's people like me who wear sneakers to campaign meetings. And there's people who are frontline fundraisers for billion dollar campaigns who are in their twenties and who are in their sixties. And so if you feel drawn to this kind of work, please come, please explore it. Please apply for jobs. Please ask mentors and people for advice, and don't feel the pressure to go on the traditional route that we've all historically felt like we need to go on to be successful. It's a new day in philanthropy and you can and should do the work that you feel most aligned to

Speaker 2:

Do. We're thrilled. You're here and let's start at the beginning. Let's start at the beginning of your career. Sure. How did you begin your fundraising career? How did you get into the nonprofit sector?

Speaker 3:

If you can believe this? My degree is in French from a small liberal arts college in upstate New York. And I joined the development team as a frontline fundraiser, a gift officer after graduation, not knowing what I would do with my life. Like so many people who I now know in the world of philanthropy. And I was very intrigued by the notion of connecting with people and understanding what they cared about and what moved them or motivated them to be generous. Or at that time I used the word charitable and now I would say philanthropic and I was kind of bold and I was a little bit of a direct communicator. So I think I was a good match for the role of going around the Northeast and meeting people and understanding them and making asks to put it kind of bluntly. So that's where I started right in the, the cold, deep end of the ocean and fundraising.

Speaker 2:

That's great. Yeah, just right there as a frontline fundraiser. Well, you know, the career trajectory for a frontline fundraiser is usually pretty clear. And I think you got off that path. What encouraged you to, to find your own way?

Speaker 3:

I meet a lot of people who are a generation above me. Who've had many years of experience in either or both an annual fund or an events coordinating or management type of role. And I knew that neither of those roles were a good fit for my personality. So I sort of bypassed that again, more traditional avenue that many fundraisers take and people kind of pressed me on it. You know, I was this 22 year old frontline fundraiser flying to cities. I had never even been to before

Speaker 3:

To meet with people, to talk to them about their philanthropy. And when I thought, okay, now I wanna do more of this, or I wanna do this at higher levels. There were so many people who were older than me saying, you really need to get a job at an annual fund. Everybody comes up through the annual fund, or you should really work on this event. You know, kind of more of the standard roles you really should work on appeals. Everyone needs to have experience in these things. And I completely rejected that notion. I argued then and still argue. Now that most often our personalities are really well aligned with one of the jobs in a development office, not all of them. And so we treat these development teams and shops as if the people are interchangeable between different roles, but they're not. I, I felt, and I still do feel that I had the personality and the skill set to be a gift officer, not someone writing content or not someone tracking the annual fund, certainly not someone putting on events because I do not have that organizational skill set. So I didn't follow that advice. I kind of stuck to my gut and the couple of mentors that I had who were a little bit more courageous in their thinking and have only ever worked in major gifts.

Speaker 2:

That's excellent. You know, you don't have to go along the way that most people go, the road less traveled works too. You've mentioned before two moments that you remember as turning points in your career and your career thinking first is a sign that you saw in madman. Yeah. And then there was a

Ted talk about how society is thinking of charity all wrong. Now, given that you just told us that you bucked the system for your career, tell us more about these two moments.

Speaker 3:

The mindset shift change is really what it was all about at that time, wanting to change your mindset, to be something that you're confident about and comfortable with that can drive you to really feel like you're on the right path, because you're thinking you're in the right head space about it. You're thinking the right way about it. Back when people were watching mad men, I remember and seeing the sign on the wall of the ad agency that said work smarter, not harder. And that was really one of the times where I was thinking, man, I love what I do, but I'm clearly spending my time very different from the rest of the people on my team, except for the other people who are traveling or working in leadership major and principle gifts. And that sign really resonated with me because I think we have drilled into probably a lot of society, but definitely fundraising that you need to be working all the time.

Speaker 3:

It's all hands on deck. Everyone needs to roll their sleeves up and help pitch in for the gala. Everyone needs to really be a part of this, you know, giving day or this golf tournament or this appeal. And I could see how being a young female in this world was not going to be easy when I'm asking people for a lot of money, but it was being made much harder by working in a different capacity at a golf tournament that both didn't move me forward or up. And also wasn't making the institution more money, right? So I'm like, I know that I can spend my time with five people in a week for one hour each and do the prep research and follow up and write proposals and bring in significantly more support for this institution or any institution than I could do. If I'm working really hard, I'm using air quotes right now as it relates to my energy and my time. So maybe it's a little taboo, but I still live by it because I felt like it took the weight off of my shoulders, off of my chest to feel like I had to be at every event and the first one there. And the last one to leave. I know if I'm working smarter, not harder, I'm just spending my time, the right way.

Speaker 2:

I really appreciate this concept of working smarter, not harder. The other thing I noticed in the beginning of my career and a theme that goes throughout is that there will always be more ideas than time. And so you have to have this discernment of how you're gonna spend your time. So work smarter, not harder is all about deciding what you're gonna do and do that. Well. Do you have any suggestions on how to weigh that to-do list or weigh all the different ideas that come in?

Speaker 3:

Oh my gosh, I could talk, I could answer that question for hours and I won't, but I will say that if you do choose a career in philanthropy, you need to know the stats and the stats are that individuals are the backbone of America's giving really understanding the basic facts around where money is coming from and how much money comes from such a small group of people. Then you will know how to prioritize your time, which in my opinion should be with other people who can make an investment in your organization. So unless you are pursuing a career in events or in advancement services, because data and daily based work is your absolute thing, then you should enter in the field understanding that you will need to prioritize your time around potential philanthropic investors and their schedule and their interests and where they live, even in order to raise the most support that you possibly can.

Speaker 2:

That's a great way to put it. And I think it actually is a nice segue to the second piece that really opened your eyes to the way we're thinking about philanthropy,

Speaker 3:

This Ted talk. And I don't even know the name of it. I think you mentioned that you'll link it or one of us will share it in the notes here, but

Speaker 2:

It'll be in the show notes and at asking for good.com. We have show notes that any articles or Ted talks or anything we mentioned in this podcast, it will be there.

Speaker 3:

Perfect. That Ted talk was so incredibly eye opening for me again, however many years ago, when I wondered if I could make a career in this field at the financial level that I wanted to. And I had toyed with so many career concepts growing up. And when people would say to me, when I was young, you know, you get into the nonprofit world. If you just wanna make a difference, or if you just wanna do good, you certainly don't get into it for the money. I, I also rejected that notion. I'm like why? You know, I can see clearly the budgets we're working with at these various institutions, they are relying on philanthropy. I wanna be compensated for my skill set and the work that I'm doing. And I think we're doing really good work at the time. I'm also first starting to work alongside people who have their JD.

Speaker 3:

So they went to law school and transitioned into this field. People who are closing 20 or 50 million gifts for organizations. So when I watched this Ted talk around, truly investing in the people who are doing this work, paying our CEO's top dollar, paying our fundraisers for what they're doing the same way a sales person, right. Might be compensated at a corporation. It really turned me onto feeling like we can and should recruit and retain the absolute best talent in all of the positions we can in nonprofit work. Our world relies on nonprofit institutions and organizations, big and small to close gaps and fill needs. And many, many, many people don't even realize the extent of the service is being used in their own communities. These people working, these jobs are talented, experienced, educated, and skillful people. Let's treat them as such and let's compensate them as such.

Speaker 2:

I think this really applies to finding an organization that values you and the role that you'll be doing with that organization. You will understand in the job application process, whether or not the organization takes seriously its staff, or whether they're just trying to fill positions. And they don't care about individual professional development as evidenced by either salary or career development opportunities.

Speaker 3:

I completely agree. You can usually tell right away.

Speaker 2:

So tell me, you're the owner and founder of a philanthropy consultancy, and many of our listeners are exploring the nonprofit sector. They're not in the middle of it. And they're either about to start their career, or they're thinking of making a big leap into the sector from another sector. So what does philanthropy consultancy mean? And how did you determine that that was the next best step for your personal career?

Speaker 3:

My husband and I co-founded the firm together. And I give him a lot of credit for really pushing us to kind of take a risk and make such a big leap. He went to law school. He was a lawyer for a short period of time and transitioned to a major gift's role when he realized that he wanted to be more in a relationship business. We met working in philanthropy on a campaign, a campaign love story, and felt like at that time, a lot of people who were a part of that campaign as donors or volunteers and board members were asking questions about what made it successful and whether we could talk to their friends or the other boards that they sit on about the success of this initiative and what went into it. And a light bulb really went off after work one night when we felt like we're both being kind of pulled in different directions in that we're both devoting our entire lives at that time to two different institutions.

Speaker 3:

And could we actually be helping a whole bunch of organizations and institutions if we decided to really serve in an advisory role on best practices, in what to do and treat people like partners, be the partner that they need that they might not have. So like every other small business we started with one client, we took a huge leap of faith. We had just been through a lot of campaign work in that campaign work brings pressure to frontline fundraisers that both feels good and inspiring and motivational, and can also feel really tiring if you're in that mode for a super long period of time. So working with nonprofits in an advisory role, we felt like, oh my gosh, it's actually astonishing how much we can positively affect them.

Speaker 2:

I think you're bringing up a, a really important distinction here. So when a charity is in campaign mode, they've got a huge, big, hairy, audacious goal. As Jim Collins would say in good to great. They have a big fundraising goal and the people who are frontline fundraisers and the rest of the development department, they're not in campaign mode all the time. This is like the surge, the, the big push and Meg's advisory group and consultancy is coming in and helping them manage not just the strategy behind being successful in the campaign, but also how do you retain staff after the campaign so that you're not burning them out during the campaign?

Speaker 3:

Yes, it's a very good point that I'm in campaign mode from an advisory standpoint all of the time now. And I think going back to keeping people aligned with their skillset is really, really important. I do not advise, I openly advise against leaders trying to kind of push people around to different roles, to keep things fresh, or to keep jobs filled. During the time of a campaign, I remain a believer that people should be very honest about what they're good at. They should not pretend that they're good at everything in order to get a job or in order to stay there. And when you are really forward and honest about what you're great at and where your skills are, and as long as you're aligned with a leader in an institution who understands that, right? Some level of emotional intelligence there, the whole shop, the whole operation and institution can work so much more effectively and, and happily and productively because people should be put into the jobs that they can Excel at and should not be pushed into other jobs just because there is a campaign or because someone else left.

Speaker 3:

And there's an onus there on both parties. I don't pretend I'm good at events to fill that role, you know, during a certain time. And I expect, right, my boss, if I'm working at an institution to see me and hear me and understand where I'm good and keep me going in the roles that I'm great at too. So I do think that's a big piece in helping to prevent burnout because all these people I meet are like, I'm wearing 10 hats. I work at a nonprofit we're, we're understaffed, right? Well, let's not be, is one of my arguments. Let's spend some money, but also if we are, let's make sure we're keeping people in their lane.

Speaker 2:

That's great. So I'm hearing that at your consultancy, you're doing so much work for nonprofits. Another side of your consultancy is family philanthropy. Would you like to speak a little bit about what that means?

Speaker 3:

Yes. Being a philanthropy advisor to individuals, families, and actually even sometimes corporations means that our firm is understanding what is very meaningful to families and where they would like to potentially align their philanthropy and then helping to direct that what we found in working, especially as consultants, but definitely early on in our careers is that donors are investors. So if I said to you, Katie, I would love for you to give me $10,000 into my business. You have questions for me. What is the business? How sustainable is it? What are your plans for this year in the next five years? Who else is giving to your business? And at what level? And if we can think like that, we can see that donors are thinking the same way. They're asking the same questions. They're treating their gifts like an investment, but they know the return.

Speaker 3:

Isn't financial, it's impactful. So how much impact can a gift drive? In other words, what are the outcomes being generated from a philanthropic investment? And when we can approach people, families, individuals, or even business leadership that way they say to us, yes, we do wanna drive impact. We wanna feel like the money we're giving is being stewarded and used for outcomes and that we know about it. So in some ways I'm an intermediary between these families or individuals and the organizations that they wanna invest in. I know what a healthy situation looks like at a nonprofit. So I go and ask the hard questions and I even help to shape some of their answers or adjust their processes so that my client on the philanthropist side would feel a lot more comfortable. And that means also too, being a little bit of a therapist with families who are trying to figure out what they do care about and how the different generations and some, you know, instances can come together to drive impact because generations think about giving very differently and almost always have different passions. So writing a mission statement for a family is a passion of mine helping to train the next generations I'm giving is a huge passion of mine.

Speaker 2:

It sounds like the families that you help can really use your expertise in understanding the philanthropic possibilities and in defining their own mission and desires as a family.

Speaker 3:

Yes,

Speaker 2:

Because you've been on both sides of the equation when it comes to making fundraising asks, you also recognized this personality difference between extroverts and introverts. And I'd love for you to talk to us a little bit about a specific fundraising ask where you saw the extroverted side of your personality and the introverted side of your personality kind of come into play.

Speaker 3:

So I used to, I told you before, I used to have Washington DC as one of my territories when I was younger and just starting out. And my job was to get people into this president's club, which was a thousand dollars a year. And I had never even been to Washington DC. So I'd land in the plane and figure out like a cab and hotels. And this was not a New York city grid, this city, right? These streets were labeled differently. And I had lot of navigating to do. But once I did, I'm like, okay, I need to focus on my job. My job is to meet with as many people as I can, which was usually five to six people in one day and ask them to join the president's club. I had the benefit of a team of people who worked at this organization telling me, here's your list.

Speaker 3:

Here's how it's rated. Here's how it's prioritized. I had a database where I could go in and read some contact reports about these people if they had ever been engaged before, but usually they weren't. They were maybe rising professionals or people who had given $500 several times, for example. And so the first time I did this, where I have some stress and anxiety even about navigating in inner city, in a new job, and I have these like folders with me with information, and I'm just talking their ear off. I'm realizing that like the hour is going so quickly because I'm trying to brag so much about all the great things we're doing. And at the end, like slip in this ask, and I'm going, getting back on the public, you know, transportation, or I'm walking back up the street thinking, I feel like this is not going well.

Speaker 3:

So I actually called during one of these trips, my now husband, who I worked with back then and was telling him about my visits and his sound and life changing advice was, do way more listening, ask questions that will give you the information you want and need. And sit back and listen, be in control of the conversation, but don't be the main talker in the conversation. And that really changed my career. I now know that if I'm asking somebody what motivates them to give, where else they've been involved, what kind of outcomes they really like to generate with their philanthropy? I'm understanding from any array of answers. Exactly what I need to know to align this person with an ask that feels a little bit more meaningful. When you're asking people for a thousand dollars at an organization, it's kind of your bite at the apple.

Speaker 3:

When you meet with them, you're not going to go back to DC three times to meet with the same person, just to ask them for $1,000. So you know that there's an art and a science here within a one hour time to understand who they are and do enough talking about your organization, doing great work and needs in order to make a compelling ask. And so I think it's really good work to start in when you're becoming a gift officer, because I think you'll learn a lot about your personality. I did. And now, even in my friend groups or with my children, with my spouse and my family, I find myself pulling from those skills actually to do a lot more listening, to asking questions, to kind of letting things just be and not, you know, shying away from that kind of Boulder or braver side of me that I don't wanna lose where I directly look, somebody in the eye and confidently make an ask of them for support, which is so intimidating. I know for so many people, but once you do it a few times and you realize that it's not personal, it's actually just about philanthropy and doing good, you feel a lot more comfortable and you get used to it. And then it becomes like exciting. You get some adrenaline.

Speaker 2:

Exactly. Yeah. You, it's not personal. You're not asking for yourself. You're actually making this really important connection between what the potential donor wants to see as the change in the world and the institution that can make that change.

Speaker 3:

Exactly. Well put, yeah, I wrote a piece that I know will be in the show notes on extroverts versus introverts. Who's the better fundraiser we hear sometimes as parents or just friends, right? That we can't listen to react. And, and we can't just like also listen to respond. We need to listen to understand. And once we understand, then we can respond. And that's the advice I give most often to people entering the field or gift officers who I'm training up for a campaign is don't listen to react and don't listen to respond, listen, to understand, and where I have had my greatest success in making asks or feeling like I built a, a relationship with someone or that next step of a relationship with someone who's really going to do something special. I have been okay with being quiet and I have asked great questions and I have listened really intently. And with intention, whether you find yourself as a more quiet person or a more social person, I think pulling from the different personality types around us to know that the person on the other side of the desk or the table should do more talking than you, is a great rule and remembering and reminding yourself that you're there to facilitate something that can impact your organization. Really wonderfully kind of takes the pressure off of feeling like you need to put on a song and a show and dance in order to do your job. Great.

Speaker 2:

Let's talk about advice we give to the next generation future fundraisers. Mm-Hmm <affirmative> you work with universities, healthcare systems, veterans organizations, ballets day schools, Y M CS, all different types of organizations. And you also talk to law school students about their career possibilities in the nonprofit sector, given your perspective of the different types of organizations you work with and the background of the law school students, what kind of advice are you giving these law school students?

Speaker 3:

Like I had said, my husband went to law school and one huge difference between our work is the way that we think and the way that we approach problems. So I would say that I've learned a lot from him that he credits till his law school time and how to communicate effectively and how to problem solve. Not everyone who goes to law school finds a home at a law firm or in my husband's case at an institution where he's in house counsel, it wasn't fulfilling for him, but he's also been filled into a lot of complicated or more complex gifts, which are becoming all the more familiar and regular in our field. So as more tools become available for financial loopholes, tax advantages, shelters, gifts that incorporate multiple vehicles, we're finding that students coming right out of law school, who are interested in more of this relationship centered field that is not traditionally about law are actually coming in and finding a lot of success right away, because they can be pulled into some of these donors that have, have needs, but maybe not a philanthropy advisor and most people don't and working right at an institution where you're able to educate them, which is a huge deal and facilitate more complex gifts.

Speaker 3:

They're closing much bigger gifts even without maybe five years of experience in the nonprofit world. And so I encourage anyone who has any kind of degree who, whose interest is peaked in meeting with people and understanding what moves them and facilitating some change for your own community or country or this world. Please come, we welcome you. That's

Speaker 2:

Really excellent overarching advice to anyone thinking about this field, especially law school students, and on a more tactical question for you than I see in job applications. There's this kind of optional check box for a cover letter. Now I know where I fall on this debate, should you, or should you not provide the optional cover letter? What is your feeling on that? What is your response?

Speaker 3:

My gut reaction is coming from a place of being an overachiever. And if someone says you have the option to do something extra, I feel like I just always do it. <Laugh>. So I say that honestly upfront, I also say from the perspective of being someone who ends up helping my clients hire mostly gift officers very frequently, I do not enjoy reading things that feel like cookie cutter and long and like an obligation, right? Like we've all wrote the same birthday card or things that feel like you're doing out of obligation. And I can feel that. So it's not enjoyable for me. You're not separating yourself from the pack. It's not like a point of differentiation for me. Most people can, will only read what fits on their cell phone. It's why people in our industry are now getting more visits with donors by sending a quick text than they are by even writing an email.

Speaker 3:

And so my suggestion is to keep something shorter and sweeter than you think you would. If you have a cover letter, I'm probably skimming it, but I'm not thinking that it's going to be some groundbreaking you know, written piece that is gonna make me feel drawn to you immediately. It, it takes people out of the running when there's core grammar, or I can tell that you won't be able to communicate and written form at the highest level. So in one way, it's great to prove that you can do that, but I'm far more apt to hire someone who send, finds my email. If they know I'm engaged or the CEO's email and sends a two sentence note that says, I submitted my materials, I really enjoy reading your blogs or checking out what you wrote on LinkedIn. And I'm particularly intrigued by the X or Y component of this job. Can't wait to hear from you. Those are the people that I know will be able to get meetings to the donors because they're concise, they're clear, they're sophisticated in their communication and they're making things personal. So I really do honestly look for the parts of the application process that show me how you're communicating with me that you'll do a great job with major and principal gift donors

Speaker 2:

Well said, well said if any part of your application doesn't show the future employer, that you will be a great communicator with donors rethink that part of your application.

Speaker 3:

Definitely. I agree.

Speaker 2:

So the last question I have for you is all about diversity, equity and inclusion. It's a real hot topic in philanthropy. Speak to us about how you're seeing this in your work.

Speaker 3:

Sure. It is a really hot topic and America and philanthropy and the change that people in our field, in the organizations that we're supporting can make. And I will say that for myself personally, this topic as an area of study is like newer. For me, I've learned more in the last couple of years than I had really learned throughout my life. So I'm being very honest and Frank in saying that I would never consider myself an expert on that. What I do like to do is find other boutique consulting firms like myself, who, who do know a lot about that space and when the families that I'm advising want to know how they can have an impact there, I ask that we spend our resources on bringing those consultants, those experts into the room around the table. And that's where I've learned the most truly

Speaker 2:

Thank you for sharing that you don't have to be an expert in everything that your real strength comes from knowing where you have holes and your understanding and asking for that help and finding the right people to help you in the best way.

Speaker 3:

Yeah. Yeah, definitely.

Speaker 2:

Meg, this has been a great conversation and I really appreciate your time. Thank you for joining us on asking for good. Find us wherever you get your podcasts. And please tell a friend, take care.