



**Let's stop walking around like we're immortal with Ramona
Ramadar**
Season 1, Episode 4

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Transcript

Speaker 1 (00:00):

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

Katie Pooser (00:14):

Hello, I'm Katie Pooser, a career fundraiser committed to making the non-profit sector better. Ramona Ramadar is the new planned giving director for Salvation Army greater New York division based in Manhattan. Ramona has more than 10 years of professional experience in nonprofit and corporate settings with the past five and a half years focused, exclusively on planned giving in her previous role as regional director of gift planning for Planned Parenthood Federation of America. She managed the Midwest region, which included 17 states there. She raised over \$1 million in new and repeat life income gifts and cultivated high capacity donors in collaboration with the national director before which she held a series of roles at St. Francis hospital with her responsibility increasing and eat. She began in marketing and special events and moved to donor relations. From there. She was a data specialist and her work culminated as a development associate in this role, she helped build the planned giving program from scratch. Ramona currently serves on the executive board of the philanthropic plant giving group of greater New York. Welcome Ramona to asking for good, where we talk to fundraisers about their important work.

Ramona Ramadar (01:38):

Thanks so much, Katie. I am super excited and thrilled to have a conversation with you here tonight.

Katie Pooser (01:45):

I'm so glad you're here. Ramona. I've enjoyed working with you on the board of the philanthropic planned giving group of greater New York. Now, your bio says that you have experience in the corporate and nonprofit sector. So tell us, how did you come to the nonprofit sector?

Ramona Ramadar (02:02):

I feel like I fell into it by accident. I have an undergrad degree in biology and while it doesn't show on my resume, I actually worked in research for two years. I thought about going to medical school for like 10 minutes and then did the calculation of what the costs would be and the time. And then I decided that may not be for me. So I thought I would get like a PhD in chemistry or biology started working in research and then realize that living on a stipend or research grant is not the way to pay bills. And I have a lot of respect for, for people in that field, in that profession. It's one of the areas I think we really, really need to, to help compensate those folks because they're the ones that are coming out with all the cures and things for us. But in any event I decided not to do that. So on my resume or LinkedIn, you may not see a lot of like my science stuff there. I used, I had a science resume separately, so I fell into it by accident. Really? How

Katie Pooser (03:09):

Did you fall into the nonprofit sector?

Ramona Ramadar (03:12):

So I worked in research. I didn't, didn't really like what I was doing. It was very monotonous. It was on the backend. I had very little to no interaction with people. And then I thought, oh, maybe I should start exploring other things and believe it or not. I was actually driving home from work one day and I saw a sign that said career fair at St. Francis hospital. I got went home to cough. My scrubs got a suit on. I walked in and there was a table that said development. And I had no idea what that was and met the director of development there. We had a conversation and she said, well, you made it to the second interview. And I'm thinking

Katie Pooser (03:55):

So wonderful.

Ramona Ramadar (03:56):

So she called me back and then I got the job as a development associate. It was, yeah, it was really interesting. And then I think my development career started from that point.

Katie Pooser (04:06):

That's excellent. Well, you had so many roles there at St. Francis. So I think you would have some good insight for our listeners. When we think about knowing when it's time to advocate for ourselves, how did you go about gaining more responsibility at work?

Ramona Ramadar (04:23):

So I worked at St. Francis hospital and at the time the development office was a very small shop. So we had less people and more, more roles and more things to do. So I think in my twenties, I just had this you know, yearning for curiosity and learning new things. And I will say, you'll know when it's time, when you're ready to move on. If you can do your job, I have the sprays I say to myself, if I can do my job in my sleep, or if I, I just know it's so well that I don't even need to think it's it's time, right. It really is. And, and that's going to be different for every person. I think it's, it's really it's really something internal and it's something that each and every one of us have to figure out on our own.

Katie Pooser (05:18):

I have a quick interlude. I had a CEO, give me a call once and say, thank you for your work here. You've been outstanding. And we want to recognize you for that. Thank you. But are you challenged right now? Is this job challenging you? And you know, you have to be honest with them and yourself to say, it's, it's not, you know, I've got it figured out and it's not motivating me anymore. So, and I guess, likewise, I wonder when do you know that it's time to move to a new organization while

Ramona Ramadar (05:57):

I was at St. Francis, I did receive about two to three promotions within the department. However, I had an inside look and I can tell, you know, where jobs were going, who was moving into what role. And I think once you have had the conversation with your boss or your employer, and you put your cards on the table and they know that you were interested in taking on more responsibilities, you want to learn, you want to grow once you do that. And you're, you're very clear about that. If, if you don't see other opportunities or investments, that's kind of a way of the organization saying maybe they don't, they can't right now, they don't have it in the budgets or, or it's not the right timing for whatever reason, but I strongly believe that each and every one of us we're in charge of our own careers. And yes, we have mentors. We have great bosses. We have friends, we have people to support us, but we are the ones that need to be our advocates. And I think once you start having those conversations and you, you feel like you're not getting the answers you want, then it's time.

Katie Pooser (07:26):

That's a great point. You mentioned having a mentor. And I think that mentors can provide some wonderful perspective. And I don't know if your mentor has ever helped you see another angle in the current role that you're in or other possibilities that are out there has, has a mentor ever guided you.

Ramona Ramadar (07:47):

Yes. And, you know, Katie, I will say I would not be where I am today without the support and advice and guidance of my mentor. She has been so instrumental. In fact, we, we have such a wonderful relationship. I'm so proud to not only call her a former colleague, but she's a friend. We worked at St. Francis hospital. I'm now in gift planning because of her. She really, she got hired at St. Francis to start the gift planning program there. And, you know, I had no idea first. I had no idea what development was. And then I had really no idea what gift planning was. So she really took me under her wings. She didn't have the support staff. They couldn't, they didn't couldn't afford to hire the support staff for her. So I raised my hand and I said, okay, sure, I'll help you with that.

Ramona Ramadar (08:42):

And I worked with her, she, she showed me how to do all the PG count calculations, everything it's like, wow, this is not that bad. And within a year of working with her, she you know, actually my former boss she met her at a luncheon and she was looking to hire somebody. And she said, I have the perfect person for you. She came back to the office and she said, Ramona, send me your resume. And I said, for what? And she sent me the job description. And of course I looked at it and I said, you're crazy. There's no way I'm going, I'm qualified for this job. And she said, no, you are qualified. And here is why. And we went through a list of every reason I found why I was not qualified. She was able to like validate the reason why I was qualified and that I said, you are actually right. I am club. It was really empowering. And you know, the funny thing is Katie sometimes it's good to, I wish I could see, see myself through her eyes sometimes because I think I would have taken a lot more shots and applied for a lot more roles. But, you know, we can only do, do our best moving forward.

Katie Pooser (09:55):

That's excellent. So if I'm hearing this correctly, you had a colleague at work, know your strengths, know your skills, know your ability almost better than you did, or that she was able to recognize it better than you were. And she came back and said, you've got to go out for this, this job. And you thought, no way I'm qualified. And she said, yeah, you are, look, you really are.

Ramona Ramadar (10:19):

And to this day, she'll say to me, whenever she says, oh, I think he should be doing this. And I think he should be doing that say, yes, you're absolutely right Question at any.

Katie Pooser (10:32):

Right?

Ramona Ramadar (10:33):

Right.

Katie Pooser (10:35):

So she was the director of gift planning. And it's easy for us to jump into fundraising and development jargon. So fundraising is also called advancement or development. And then gift planning has also been called legacy, giving a state giving plan, giving a lot of different ways to say it, but it's basically non-cash assets and structured gifts. And the big elephant that most people shy away from is we are talking to donors. When we talk about a planned gift. We're oftentimes talking about their long-term financial plans and their estate plans. We're asking donors to remember our charity in their will or trust or other long-term financial plans. Ramona, I would love for you to share with our listeners and ask from your work in planned giving that would encompass this big elephant that we're talking about, the idea of death. Wow.

Ramona Ramadar (11:38):

I worked at Planned Parenthood Federation of America. I was the regional director of planning there and I covered the Midwest one afternoon. A call got transferred over to me from somebody in Pennsylvania. And the coordinator just told me this person is not in our database. We have no idea who this person is. And he's interested in a crutch. He just keeps saying CRA now CRA means a charitable remainder trust. And so the call gets transferred and I'm going to call him Mr. S. So Mr. S gets on the phone and he's like, hi, I'm interested in a in a crunch and I want to have my payments fix. And I, and, and here is I want to use cash and, and here is what and I, so I said, oh, great, thank you so much for contacting me.

Ramona Ramadar (12:34):

Do you guys do that kind of gift? So then we started talking and I said, well, I'll explain, I'll explain to you what a credit is. And so we went over a little bit of an overview of a CRA. We said, you know what? I don't think that's what I, I want to do. I said, really? I said, well, let me tell you about a charitable gift annuity. So we started talking about a gift to know, he's like, that's it Ramona, that's what I want. So I said, wonderful. I'd be happy to send you a proposal in the mail which I did. I said, would you mind telling me how much you you'd like to fund this gift for? And he said, at the time, a hundred thousand said, oh my God, this is so generous of you. Yes. So I said, I'd be happy to have a follow-up call.

Ramona Ramadar (13:19):

And once you get it, if you have questions, let me know. He said, okay, that's wonderful. I called him to see if he received it left a voicemail, never got a call in the mail. I get an envelope with a business reply envelope. It says attention, Ramona. Cause I wrote my name on the envelope. And I did provide a stamp for him. So he didn't have to go to the

post office and he sends the application with a check and then he included a post-it note with a little note to me. And it said, you know, do you remote it? Thank you so much for your help. Thank you so much for explaining to me the, you know, the different types of gifts. And I decided I'll do a little extra, it was a check for \$300,000 annuity and I, the time. So I looked at it and I thought, oh my God, wow.

Ramona Ramadar (14:08):

I was so excited. It's up the phone and, you know, and, and called him. And I, and I will say, you know, I visited with him on two occasions. And every time I visited with him, we went to the same Japanese restaurant at lunch because lunchtime, you get the special Bentall box. And we both ate the same thing. And every time I left Pennsylvania and I came back to my office in less than two weeks, we received another check of \$300,000 with an application. And he ended up doing four cGAS and each was \$300,000. So that was really amazing. He knew what he wanted to do. And he was one of those low key donors that did not necessarily want a lot of attention. We talked about, we have a donor wall, and we talked about things like that. And he's like, Nope, I'm not interested. He said, whenever you're in Pennsylvania, we'll go to lunch. And

Katie Pooser (15:07):

Fantastic. So this donor is a person who likely had been supporting the organization for decades. I'm assuming before he called up one day and said, I'm ready to make a hundred thousand dollar gift,

Ramona Ramadar (15:21):

Right. He was a lapsed donor. He was a small donor, but then for whatever reason, I don't know if mailing stopped or his giving stopped. And they didn't, you know, with his addresses cause he moved into a retirement home. And oftentimes I think with older people, when they, when they moved from their primary address into a facility, some things they change facility where they go into more of an assisted living and then unfortunately hospice and things like that.

Katie Pooser (15:53):

Well, I wanted to quickly say that with the charitable remainder trust option and the charitable gift annuity option, this is something that distinguishes a planned giving fundraiser from a major gift fundraiser or an annual giving fund fundraiser. Those are gifts that pay lifetime income. So this donor would have made these gifts and then received a portion back for his lifetime. And then at the end of his life, the full remainder would go to the charity. These can be some really significant and important gifts. Can you tell us about how you learned of his passing?

Ramona Ramadar (16:33):

So obviously we, we had a very close relationship, you know, I called to check in, I sent them birthday cards, holiday cards, things like that. And I didn't hear from him for like how me three to four weeks. And I just had this feeling in the pit of my stomach that something was wrong because I was calling and I had sent the notes and it was not like him to not return the calls. So finally got a phone call and he was in the hospital and we had an interesting conversation. I don't know if interesting is the word, but we talked about his health and how he was doing. And Mr. S was in his nineties. So I just want to share that. And he started reminiscing about how wonderful his life had been and all the travels and, and all the, the really sweet endearing things that he's shared with me in the past, during my visits we talked, we kind of like did a whole recap of all of that.

Ramona Ramadar (17:37):

And then I said to him, you know, I will call you, I will call you next week to check in with you. And he said, you know, Ramona, that's very sweet of you, but I may not be here. And Katie, I will say to you when he said that I, I think I was in shock, but he said it with such grace and compassion. And I mean, he was the one saying this to me and I'm feeling like all these emotions and things. And obviously I'm trying to be professional too. And he said, but that's okay. He said, you're going to have an amazing life. And I wish you, you know, I wish you nothing, but the best and your life will be beautiful. Ramona. Remember that? And I will say like today, him today. And I'm like, whenever I think about life and all the terrible things and like no one there's beauty in everything. Right. So,

Katie Pooser (18:38):

Right. Yeah. That's that perspective, you know, is one of the reasons why I really appreciate working with this age group and this type of donor, because they, they do have that wisdom that comes with a life well lived. And, and they just, your, your comment about his peacefulness matters to,

Ramona Ramadar (19:00):

And I will add that was the last time, unfortunately, that we did speak that the next time I spoke to his friend who was in charge of his estate and taking care of things, we did receive a bequest to from him, you know, and his friend did share with me, you know, he, he always talked about my visits with him and things like that. So I guess a part of me felt a part of me felt like, oh my God, like, I didn't do anything for him. If that makes sense. Like maybe I, I, I don't know I could have done more. But then when I listened to what the friend shared, I thought, wow, maybe I did do something. So right.

Katie Pooser (19:46):

Part of the reward of this work is that you are representing the cause that brings you in the donor together and you get to be the voice of the organization and the cause. And you are also building a personal connection. It's a professional connection, but it's a personal connection. And I think that's a really rewarding part of a career in planned giving Ramona. A lot of people talk about planned giving and how they don't want to do it if they're fund development professionals. And they say, I don't want to talk to people about death. What do you say to that?

Ramona Ramadar (20:26):

I say that talking about death is also talking about life, right? It's, it's part of the circle of life. I also say it's, it's part about what you leave behind your meaning, your purpose, your values, your legacy. So it does not have to be a more bid conversation. And you know, the truth of the matter is he, even if we don't talk about it, it's something that's inevitable. It will happen to each and every one of us. And I think if we appreciate our own mortality, perhaps we might take bigger risks, bolder risks, perhaps we might say, you know what, tomorrow we may not know if we will do this. Maybe we should do it today. And that is something that I personally I try to do every day. I will say, it's a practice, just like my yoga practice.

Katie Pooser (21:24):

I think I get better

Ramona Ramadar (21:25):

Each day, but, you know, but I also think that inside each and every one of us, I mean, we walk around for the most part, like we're immortal

Katie Pooser (21:34):

For sure. Thank you, Ramona. In your new role, you're also a hiring manager and I want to hear from you what you look for in a candidate.

Ramona Ramadar (21:45):

Well, since COVID, you know, a lot of the interviewing now is virtual. My preference is really to meet somebody in person. I think I think it's great to have a well-polished resume and to check all the boxes. But I, I also think that I need to, to have an interaction in person, obviously, you know, because of the pandemic, sometimes you're forced to do it virtually. I think virtually is also helpful. I look for people who are curious, I look for people who want to be challenged, who were open-minded to trying different things, who will also challenge me. And I think those are some of the things I look for. I want someone who's on my team that will say, Ramona, I have a better idea for that project. I think we should be doing it this

way. And those are some of the things that I think about when I'm hiring and not necessarily, you know, do they have all the boxes checked on the job description, right.

Katie Pooser (22:48):

Are you ever thinking about how is this person going to fit into the whole team? Yes,

Ramona Ramadar (22:54):

Yes. So after I do the initial interview, I would most certainly have the other people weigh in that's on my team because you know, you're only as strong as your weakest link, right. And being, being a productive, successful team. And when you're in flow, I call it flow. Like when you're in flow and you're working with a team, I mean, you can be a team of two or three and you could be a rock star. You can also be a team of 10 and not get anything done. Right.

Katie Pooser (23:26):

Right. If you're not synchronized and you're not going towards the same goals, that's excellent. Now that your career in fundraising has hit the decade. Mark, can you talk to me about any resources that you have relied upon over the last 10 years or any resources that you've newly found or resources that were extremely helpful at the beginning of your career?

Ramona Ramadar (23:55):

So I will say finding a mentor is extremely important and also reading continuously reading and, and that's something I think each and every one of us should be doing on a regular basis. I mean, I personally would love to read a lot more than I, that I do, but I try to, you know, get a book at least a month, one book a month, listening to podcasts, as far as for the non-profit world, you know, I'm a member and executive board member at the philanthropic plan giving group of greater New York, also known as Pickney. So try to find an organization that aligns with whatever sector you're going into. And, and in this case it would be, if it's just a broad range of development, then it could be AFP. It could be with things like that. I think

Katie Pooser (24:47):

That's the association of fundraising professionals and women in development with those acronyms, right? Yeah,

Ramona Ramadar (24:55):

Yeah,

Katie Pooser (24:55):

Yeah, no, that's great. And can I interrupt really quick with this idea? No matter where you are in the world, the websites of these organizations can be useful and they will be doing virtual events for the future. You know, it's, it's not going to be mandatory to be in person to be involved in some of these groups. So if you're, if you're listening from a place that you'd feel is sparsely populated, know that you can be connected into these professional associations without necessarily being geographically centralized.

Ramona Ramadar (25:32):

That's a great point, Katie. Yes. And one other thing I will add if you're starting out in a development office and maybe you are the admin or a coordinator, look internally at your organization and look at the, the roles and the jobs that perhaps the director of development have, invite them out to coffee. Perhaps you send an email and say, Hey, maybe we have lunch or something like that. These are the people that are seasoned. They've already done a lot of time within the organization. Perhaps they might be a break connector for a future role and things like that. So I always liked to tell people too, it's great to go outside, but also start where you're at because sometimes the, as we call some donors hidden gems, the ones that are right right there.

Katie Pooser (26:23):

Yes. Yes. That's a great, a great, great point. You know, it's, it's awesome to have LinkedIn too, because you can look at the resumes of the people that you work with and you, you may not ever know that they have extensive experience in a certain area or a similar life story as you, you, you may not realize how, how connected you may be to the people closest to you at the office.

Ramona Ramadar (26:49):

Yeah. And for example, Katie, I will say I've had a coffee before COVID with two people who connected through a connection on LinkedIn connected me to the person. So yes, to your point, that's happened. And I, I met them for coffee.

Katie Pooser (27:05):

That's great. And while we're here that this is all about engaging your network to help you identify potential roles, to help you identify where you could go next or what you could do next. And this is the point in time where I have to say, check out informational interviewing every fundraising professional I've ever come across is happy to talk to a well-prepared person. That's rising in their career. Ramona at philanthropic planning group of greater New York. I know you're our diversity equity and inclusion. Chairwoman. Can you tell me how diversity equity and inclusion play a role in the work you do or in the volunteer work that you're doing?

Ramona Ramadar (27:50):

I'll talk a little bit about my role at the philanthropic plan giving group of greater New York. The, the conversation around diversity equity and inclusion actually began about three years ago with the board and COVID happened. And it really forced us to take a pause and really take a step back and reflect and think about where the organization was at last year was also a very unique year. There was a lot of social unrest and injustice and things like that. I think what was happening within our communities and society also made this work, something that we need to prioritize. So the board of pygmy decided, you know, yes, this is work we want to do. We looked deeply within the current structure, culture and governance. And we acknowledged that we didn't know a lot of things. So we, we brought in a coach and a consultant who came in and provided training for all the board members.

Ramona Ramadar (28:49):

And then we, so we started with the organizational leadership and then we worked to identify ways in which we can address diversity, equity and inclusion. And we really had three main goals. We wanted to make sure that the board had clarity and commitment of DEI principles and practices, as they relate to building effective boards. Second, we wanted a diverse who'll of board candidates and then directors that reflect the changing demographics of Pygmies membership, because we were forced to be online and we can see that a lot of our membership base was changing. So that was important. And then finally, we wanted to make sure we have a welcoming and inclusive word culture because you cannot invite people to be on the board and then not have a place to welcome them or empower them in, in making decisions. So that pretty much was kind of in a nutshell, what we were to do.

Ramona Ramadar (29:41):

And I have to say, I am really proud and happy with all of our work so far, we're not finished, and this is something that's going to be ongoing. One of the things that surprised us, actually, we had stronger board engagement, believe it or not because of this project, everyone on the board rolled up their sleeves and got involved, attended both training sessions and a wrap-up session with the consultant. And we were able to complete a DEI statement. We had a board manual, the DEI chair position got elevated to the executive word. And I can't wait for pygmy to see where we're at in 2022, because if we did so much within the past year, I think possibilities are endless.

Katie Pooser (30:26):

I appreciate the idea that you've echoed twice. Now this concept of you can have a team of three people that do great because they're in sync and you can have a board of directors that may have been not as engaged, but then given a task that they could really

sink their teeth into, they became so much more engaged. I think that's a key takeaway for me on that concept, but more importantly, your idea that the diversity equity and inclusion process is not one year or one semester or one meeting that it's a process and that it's something that strengthens and grows.

Ramona Ramadar (31:06):

Absolutely. And listen, I mean, I'm a woman of color. And in, in my, in this profession, let's be Frank. There's not a lot of women of color in this profession. And I personally feel like I have a commitment to the profession. And for that matter to help engage, inspire, encourage, support other fundraisers who might be thinking, you know, I do, I do, would love to be in that career, but I don't see anybody that looked like me.

Katie Pooser (31:34):

Yeah, yeah, exactly. The inclusion piece, I think is I almost wish it were backwards because I think if you start with the question of, is everyone here included, do they really feel included? Thank you. Start to see quickly how you have failed as an organization.

Ramona Ramadar (31:55):

Yeah. And what does that mean? Right. But including, are we just checking a box to put a person of color in that board seat or are we really saying that they can make decisions and they have the same voting rights, just like anybody else,

Katie Pooser (32:08):

Do they feel included enough and dalled enough yet, right. To really say what they're thinking and really share their authentic perspective. Well, Ramona, thank you for your time. Thank you for all you're doing in the world as the diversity, equity and inclusion chair of Pickney as the director of gift planning at Salvation Army, as a mentor and as a woman of color and fundraising inspiring others, we really appreciate it. And thank you for

Ramona Ramadar (32:39):

Time. It's been my absolute pleasure. I really enjoyed this conversation, Katie. And I have to say, I love working with you. I know you're also on the board at the philanthropic plan giving groups. So I truly enjoy working with you. And when I mentioned flow and being in flow with someone, I think from my perspective, I will say, I feel like we have a little bit of flow going. I agree if there's anything I can do to help you with anything, you know, I'm, I'm here. Thanks Ramona.

Speaker 4 (33:12):

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