

Giving Growth Podcast - Julie Upham (full transcript)

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Greg Sobiech

I think as VP or C-level executives, it's easy to think about it's just about money, but when you actually talk to people and you do research, there are so many intangible elements like who am I reporting to, do I know how to move up, is someone paying attention to me, are they actually guiding me in a direction when I'm unpacking my possibilities. Is there one element of intangible value that you lean into that you think is really important for the industry to pay attention to?

Julie Upham

Yeah, it's passion points for me. When I want to get to know a donor, I want to know what makes them passionate, what makes them tick. It's intangible when you are looking at your team.

You don't assume a passion point for a donor, you shouldn't assume a passion point for your team. And understanding what makes them tick, what they care about, that allows you to help them feel inspired and to keep doing their work. People just say, oh, it's money or it's hours or it's benefits, but it's more than that.

So just getting to the heart of finding those passion points for your team will help you retain them. It's something I use that term of like finding what is your passion point. And sometimes I even ask that directly, like what is the thing that you're most passionate about, about your work?

And oftentimes it surprises me. Like, oh, great, well, that's good to know. And I know how to manage you and inspire you and think about your growth, but I have to know that to be able to do it.

Greg Sobiech

Julie Upham, Vice President, Individual Giving at Conservation International. Welcome to the show. Thanks.

Charities do a great job of getting into the head of the people who donate, especially mid and major donors. I've never done fundraising myself. I imagine that there is a whole set of instructions or manuals or training one goes through to learn how to talk to someone or how to deal with someone who may become a major donor to an institution.

Does the same thing happen when it comes to the people that work for us in mission-driven organizations?

Julie Upham

I don't think so. You're talking about on the getting to know your donor, we spend a lot of time getting to know our donors, especially as we want to move them up and retain them.

But I just, I don't see that same thing of thinking about how you retain a donor, but how you retain your staff.

There isn't the same investment. People will invest millions of dollars learning how to better retain donors. They'll go to conferences, they'll bring in consultants, but just not seeing that same parallel to how they retain their staff and being able to keep staff helps you fundraise more.

And there's just this discrepancy of how people are investing in that. So it's a challenge for our industry for people to not have that investment, same investment in their staff.

Greg Sobiech

Is it more important in your experience to get the right donor who has potential or to work that donor and develop them into someone who can become a major contributor? How does this link to our people?

Julie Upham

Yeah. Well, I mean, for any fundraising, you need a pipeline. So you have to have donors, but the best donors are the ones that you already have.

How do you grow them? If they're already in your world and they're already giving at whatever level, they have an affinity towards you and they're giving and they're showing that they give. So investing in them to grow them, to retain them, those are your donors.

That's your bread and butter. And it's the same thing on the staff side. If you've invested in bringing in good people, keeping those people, helping them learn new things and helping them grow with your organization will let you evolve.

Also keeping the staff, you don't have the downtime of having vacancies and losing dollars. And it's the same thing of like, it's really expensive to bring in a new donor. It's really expensive to bring in a new staff person and have that gap of having a role empty.

You're losing dollars every single day if you have a spot open or you have someone who just leaves and not being able to fill that.

Greg Sobiech

I was reading that 19% of people that charities hire will leave within the first year, but in the private sector, that's 13%. So in a way, charities lose one in five people every year, and that's a 60% higher attrition rate than what one would see in the private sector. So I would think that with attrition being what seems to be a problem, charities would apply their best practices from how to manage donor retention to how they manage staff retention.

Is there a retention problem in the industry?

Julie Upham

Yes. Oh yes. And some of it, everyone will say for compensation.

Private sector can keep people because they pay more. That is important, but it's not the most important thing. People are working for nonprofits because they want to give back, because they are mission-driven, and they want to be there.

Where that stops is sometimes leaders and nonprofits are thinking that's enough. The mission should be what drives you all the time, yet there's bills to pay, there's things to do. People want to grow in their roles and with an organization, and if they don't see those paths, then they don't feel like they have a place to stay.

It's the same thing with a donor. A donor wants to be able to know they can grow with the organization. If they're giving more, they want to see what it's doing and how much more of an impact.

Now, if you have a staff person and you're not showing them the impact of their role or how they can grow with you, they're not going to stay. And I use that same, you know, fundraiser has a lifespan of 18 months at your organization. That's not even two full fundraising cycles.

Now, if I thought about that from a donor front, that's terrible. Losing donors like that, I would never let that happen. But of the people side, we just let it happen.

It's not something people talk about enough. It's very dismissed. 18 months, that's a lifespan.

I want people longer than 18 months. That's not something we should settle on.

Greg Sobiech

I donate to a number of causes and at different levels, sometimes I guess it's major, sometimes mid, sometimes mass. And when I think about myself, there are tangible and intangible reasons why I want to be part of someone's mission. And when I think about even my team right now, it's 150 people that report to me in some way.

And when I think about, and as an executive team, when we think about their motivation, there's tangible and intangible elements of motivation. And to your point, I think as VP or C-level executives, it's easy to think about it just about money. But when you actually talk to people and you do research, and I think that's what you're bringing up, there are so many intangible elements, like who am I reporting to?

Do I know how to move up? Is someone paying attention to me? Are they actually guiding me in a direction where I'm unpacking my possibilities?

Is there one element of intangible value that you believe is really important for you and your team to lean into? Is there something that is a key driver of retention or engagement that you lean into that you think is really important for the industry to pay attention to?

Julie Upham

Yeah, it's passion points for me. When I want to get to know a donor, I want to know what makes them passionate, what makes them tick. It's intangible when you are looking at your team.

You don't assume a passion point for a donor. You shouldn't assume a passion point for your team. And understanding what makes them tick, what they care about, that allows you to help them feel inspired and to keep doing their work.

People just say, oh, it's money or it's hours or it's benefits, but it's more than that. So just getting to the heart of finding those passion points for your team will help you retain them. It's something I use that term of like finding what is your passion point.

And sometimes I even ask that directly, like what is the thing that you're most passionate about, about your work? And oftentimes it surprises me. Like, oh, great.

Well, that's good to know. And I know how to manage you and inspire you and think about your growth, but I have to know that to be able to do it.

Greg Sobiech

So what are some ways to get at a donor's passion points? And how can one apply those methods, those skills to get at the passion points of my team?

Julie Upham

Yeah, well, I work in conservation. So this is actually pretty, I think it's an easier question. And I ask about places where they've traveled.

Where do they feel most at home in nature? And that, you know, they might say, well, I'm in a forest or when I'm at the beach or when I'm in the savanna and seeing wildlife. So then I can keep asking those questions just to unpack that a little bit more.

Like if they're current donors, I can also ask what brought them to our organization. But finding those and asking those leading questions, people will talk for hours about what things that they love. Um, and it's, you know, it's a safe question to ask and they will keep talking and you just learn and you shut up and listen.

That's what good fundraisers do. But on the, you know, on the team front, sometimes people don't feel like they can always answer that. So it's creating a safe space for them to do so and keeping on asking that, you know, I love it when someone is direct with me.

I've, you know, a person who's like, I need any money to pay my bills. I'm like, that's great. But I also, if I stopped there, that's all I would think that she was passionate about.

Now I know ask, keep asking those questions. She wants to feel successful. She wants to lead.

She wants to grow. Great. Now I know because I asked that and we kept uncovering it.

And that's an ongoing conversation. It's not a one-time thing. Same thing with donors.

Greg Sobiech

At my company, we, we call that, we call the passion point far in the belly. And I'll tell you, honestly, it's our number one tenant of our values, making sure that we are dialed into the team members' passion and also customers. But it's really sad to admit how often I forget about this.

Like I will literally forget to ask people that report to me what they care about the most. And I have to admit, I don't know that I remember it for every person that reports to me.

Julie Upham

Yeah. Yeah. And that's the, taking the time to get the people I'm, I'm driven.

I just want to get to business. I just want to get things done. Check my list.

I mean, I've seven direct reports, every check-in that I have with them. We start with what's going on in your world. What, you know, how was your weekend knowing them as people first.

And it's, you know, I care about them as people, but it's something that I've focused on doing every single time because how they're existing in their world impacts their work. Are they having a hard time impacts their work. It's hard to do when there's a lot of things on your plate.

Even if you're not asking, it'll keep reminding you that, okay, here's what they're passionate about. Here's how they want to talk about things. Here's something that may impact their work.

And then, and it's on a weekly basis. So all these check-ins are weekly. So you're just constantly reminded what they need and what their passion points are.

And I have all of my managers and my team, I have them and expect them to do that as well. Even if it's not natural, I expect them to do that as well.

Greg Sobiech

If you were advising someone who maybe is a recently promoted manager or is already managing teams and you were advising them on, you know, here's one or a handful of rules to do to really bring to the surface what someone's passion point is. What are some things that come to mind? What are some principles or some just even tactics that you think people should follow?

Julie Upham

Yeah. New managers on my team, I remind them that people leave because of managers. They have bad managers.

So their job, in addition to what their daily tasks are, is to be a manager first and to be to be there for their team. So that's one. But it's that you have to have weekly check-ins with people.

So much in the nonprofit space changes quickly. You have to be able to have those regular check-ins. And if for some reason you can't, finding some way to be in communication, that is second rule of making sure that they're working with their team.

But that it's the, I also expect them to have those what's going on in your world discussions so that I can know as well. You have a large team. I may not be able to talk with every coordinator on my team, but I expect those managers to come back and tell me, what do I need to know?

How can I be helping them? What roadblocks can I get out of the way, even if I'm not working with them directly? But that is an expectation that's very clear.

And it's part of their goals. It's 20% of their goals every year is to be a manager. And that's how it's graded.

Yes, dollars raised first, but then the people side second.

Greg Sobiech

And I often use, for some reason, exercise as an analogy in sports. And I don't actually watch organized sports. I'm not wired for that.

I'll watch Super Bowl once a year because I like seeing the halftime show and just knowing what's going on. But I just really don't watch. Even as a Polish person, I don't even watch soccer as a European.

I just don't find it interesting, which is kind of sad. But I find the methodologies, the fundamentals that anyone who is an athlete goes through really relevant to business. Because what you said, Julie, have a regular weekly meeting with your staff member.

It's easy for me to cancel a meeting if something is happening. If I'm meeting with a donor or customer or investor, it's easy to cancel that meeting and say, oh, I'll talk to you next week. And yet it's so fundamental.

Your point about communication, again, it's very easy not to communicate clearly. I actually find that over communicating is just communicating enough. When I think I'm over communicating, maybe I'm actually doing the bare minimum.

That's my personal sort of reaction to what you said. We underestimate the value of fundamentals.

Julie Upham

And very relatable to donors, too. Donors want to hear from you. And some donors just want to hear from you once or twice a year, period.

That's done. But you've asked them. And that's the same thing with your team.

What's the best way to communicate? But some donors just want you to know that you're thinking about them. And I read this article, I send it to my donors, just made me think about you.

And it's the same thing with our teams. They need to know that you're thinking about them. My calendar is open to my team.

They can see if I've private something, it's locked private. But they're like, oh, your calendar is so packed. I didn't know if I could talk to you.

He's like, I will prioritize you and what you need. Yes, I may be in another meeting, but make sure that I'm talking to you about this issue. And I think that's the same thing of donors need to know that there are priorities, but our people also need to know that they are our priority as well.

You have to make that time and you have to be able to be available to them.

Greg Sobiech

I think what you're saying is that if I am interested in a donor, I simply have just, I don't want to say passion, but a keen interest in keeping that person informed. And maybe, yes, someone told me that this is the thing to do because I was trained to come across as interested, but I actually am genuinely interested. A donor will feel that they will know when it's real versus fake.

And the team, someone that reports to me will also know whether it's real or it's fake. I actually think, by the way, that even if it's a little fake to start with, maybe it's okay. Maybe I need to develop that muscle of interest to then become interested.

But there's something about just a genuine desire to show that I care in someone's development as a donor or a team member. What are you hearing?

Julie Upham

Yes, the muscle and the discipline of it are very important. And you think about that from a donor's side, I have metrics that tell me how many times I'm supposed to reach out to a donor. My background is in the individual space, so I work with a lot of major donors.

So it's a little bit easier because it's smaller scale, but I have metrics of how many times I'm supposed to reach out to them and talk to them and have a meeting with them. And while it may feel a little forced, being there, I need to be authentic when I'm with them. They need to know that I care about them, that I prepare, that I want to be with them.

And on the staff side, that authenticity needs to translate as well. So it's the, yes, I'm communicating with my donor, they feel informed, they feel connected, they're feeling my passion for the organization. Same thing translates to our staff.

They're feeling like they're part of decisions or they feel like they're having information. They're passionate about the organization and they stay. Like I said, bad managers, but if they also don't feel connected, they'll be inspired by someone else and they'll leave.

And that's the same thing with a donor. If they don't feel connected and they don't feel that someone cares about them authentically, they'll go find another organization to fund. Lots of nonprofits out there that need funding.

They'll find one that makes them feel that way.

Greg Sobiech

Do you think that this idea of I deeply care for my donor or I deeply care for my staff member is something that can be trained? Is it something that develops? Have you seen people who just naturally have this?

Or maybe someone just always struggles with this almost intangible sense that we give a donor or team member that we actually give a damn, even regardless of what they do.

Julie Upham

Not all fundraisers are cut out to be managers. Sometimes organizations, you're like, you're a fantastic fundraiser. We're going to promote you to now have a team.

They're like, Oh, okay. Well, I like the promotion. I like the, you know, the thing that I'm doing, but they don't know the first thing about managing people.

And if they don't have some of those innate skills, it's going to hurt their fundraising and their ability to talk with donors. And it's going to hurt those people that they're managing. So I believe that there's some discipline that people can learn and be managers, but not everyone, not everyone can be, you know, using your sports.

Not everyone's going to play in the world cup, but they can still play soccer. But it's not, everyone is going to be that world-class manager and keep their team. That's okay too.

You can try, but be quick to move if it's not working too. It's finding some of those innate passion. I'm connecting to you as human skills and giving them some of the training, but don't assume that people are going to be good at it.

Just don't assume because if it doesn't work, it goes down in flames. That's not a good thing either.

Greg Sobiech

I think we all do it. I have so many stories of people that I have promoted into bigger roles and there were amazing individual contributors. And then I just did them disservice by probably promoting them too quickly or into a role that they didn't want in the first place.

But to your point, a promotion is a promotion. Why would I want to take it? Something else that I have really been leaning into and getting better at is feedback.

I actually have a theory that people in their forties and fifties are afraid to give feedback to their teams because we are concerned with sharing it the wrong way. And yet I think that younger people, and I'm on purpose creating like an older, younger, it doesn't have to be about age, but typically you have someone who's a little more mature, that's someone little who's early in their career reports too. There's a bit of a lack of courage on my part and on part of my generation to provide that feedback, even though people want to know what they need to do to succeed.

And if we don't tell them where they stand, how are they supposed to know what we are thinking and expect? How do you find sharing feedback?

Julie Upham

Yeah. First thing I ask, and I even ask this in interviews, how do they like to receive feedback? Knowing that what resonates with them, you know, maybe they want to hear direct feedback in the moment.

Some people like that. Some people handle that. Some people really don't handle that well.

And it's the, you know, I'd prefer maybe if you wrote it down and sent, and they have the time to process it or tell me in the moment. So I know how to fix it because they just want to fix things. Understanding that so that you want them to do better.

You can give them the feedback in the way they best receive it. It's the same thing for appreciation, feedback and the appreciation, know how they'll receive it. We were talking, if you praise me in public, I will like shrink down into my shell.

I was like, ah, I get read. But if you send me a note or send me an email, hey, I noticed that thing you did. That's really great.

I love it. And that I need to know that about my team, you know, and I don't think less of them if they want to be praised or have that moment of feedback. And like, that's just not me, but that's fine for them.

And I just, I have to ask that. I have to know that about them to be able to do it well. And I have some people on my team who want that immediate feedback.

And sometimes that's hard for me to do, but it works best for them. It's very different. Seven direct reports.

I have to know seven different ways of giving feedback. So it resonates.

Greg Sobiech

And feedback is obviously both positive and negative.

Julie Upham

Yes.

Greg Sobiech

How do you, how do you mix one with the other?

Julie Upham

Um, this comes from, uh, sorority days, eons ago in college. It's the pro con pro. Um, you know, or you can call it the feedback sandwich, right?

Of, I really liked the way you did this. You know, this is something you can think about and doing it in a different way. This will help you get to it and then sandwich it and end it with a positive compliment.

So it's not to minimize it, but it's to make them feel confident in the things that they are doing well. And it allows them to, you know, take that feedback of like, okay, I am doing some things well, but there are some things I still need to approve. And that's, you know, it's not a special snowflake sort of thing, but it is definitely a, you know, praise people when they need to be praised, but then give them that feedback.

It's the pro con pro make it a, the happy sandwich. And people, I feel like people receive that better because they want to know they're doing a good job, but they also want to improve.

Greg Sobiech

Is there an element of being in a social impact organization that makes the retention of staff harder than if we were working for insurance company or a retail company for someone

who's for profit? Is there a systemic difficulty that's linked to charities that makes it that much harder to retain people than if we're working for the private sector?

Julie Upham

Yeah. And this is more than a money thing. So I'm not even going to touch that because people are at nonprofits for the mission.

You need to be able to help them feel connected to the mission any way you can. International organization, I can't take them to see every project that we have around the world, but if there's a speaker, I can help them feel connected to the mission. Now, where that can burn out is if as a manager, I think that's the only thing they need.

It's like, well, you should be working these 70 hour weeks because you care about the mission. Absolutely not. That is where a lot of nonprofits fall down on.

They need to feel that passion. And if you're not working these crazy hours or willing to do all these extra things just because you care about the mission, that's not fair. And people leave that.

They want to have lives. But if they're working 60, 70 hours a week just because they care about your mission, they're going to be gone soon. And that's a big thing in this sector.

You need to keep people who are new to the career, who are passionate, you need to keep them in. And you can't let them burn out on that early, early stage just because they want to be working for your mission.

Greg Sobiech

Well, I could see how, let's call it compassion fatigue, right? I could actually see how if I'm managing a team of fundraisers or other professionals at a charity and I have this expectation that the mission will be the main element of engagement and motivation, that can actually backfire because when you are, let's say, conservation international, right? And there are all these pictures online of situations that are heartbreaking, that can be actually, I think, overwhelming.

So it makes sense to me. We can overdose mission, I guess. Is that fair?

Julie Upham

Oh, yeah, absolutely. Especially people who are working in the human side of it, of children as a parent. I mean, that would be really hard for me.

You also have to let people feel the impact. If you're constantly driving, you never have the chance to feel successful in the work that you're doing. I also relate this to the fundraising side of it.

I call it the moving finish line. As a revenue generator, I don't always have time to celebrate the fact that we just got a gift. It's like, okay, good.

Let's move to the next one. Let's move to the next one, move to the next one. And it's that's exhausting as a fundraiser.

Like I run races. I don't want you to move the finish line. I want to know where I'm going.

That happens in a lot of places because resources are scarce. You keep things moving, that'll burn you out. The mission fatigue and the fact that you can never feel successful or truly successful, it's exhausting.

Greg Sobiech

Because you're never done.

Julie Upham

You're never done. I don't want to keep running a marathon 24 hours. I want to know when there's a finish line at 26.2 miles. So even if I have to get back on the treadmill and do another mile or two after, but still, I just need to know that there's a finish line to feel good about what I'm doing.

Greg Sobiech

So how can we create those finish lines for our teams when, again, in the example of your organization, there's lots of work ahead to be done for earth to be in a place where it should be. It's definitely beyond our lifetime. This work will be maybe never done.

Is there a way to create these points that we can celebrate, little milestones that we can call us around and pat each other on the back and feel good about?

Julie Upham

Yeah. I mean, in the conservation space, it's urgent and becoming even more urgent. The need for dealing with climate change and oceans warming, it's that pause of celebrating those big wins.

If there's a new conservation agreement signed with the government, we take that pause and celebrate. That's the same thing on a fundraising team. Everyone in the US is fundraising towards that calendar year end because of taxes.

Are you taking the time in January to take a breath? We close the week between Christmas and New Year's as an organization to give people time off. When is the busiest time for a fundraiser?

That last week of the year. So we don't necessarily get that time off, but we take that time in January and being able to pause and celebrate what we did and be able to feel that finish line. Yes, we did it, but we still have six more months in our fiscal year to go.

It's the same thing that we're trying to do in conservation. It's never going to be done. It's definitely not done in my lifetime, but what are the milestones that we're hitting?

I think about that in fundraising. What are the milestones that we're hitting? Celebrate and then keep moving.

Greg Sobiech

I mean, what I'm hearing you say is that when it comes to retention, compassion fatigue can be a real thing. But if I take the moment to celebrate the gains I've made and not dwell too much on the gaps, which many remain, that could be one way to, again, mitigate kind of

mission fatigue, but also that should translate into my team feeling like I have a accomplishment and maybe that will translate to retention better.

Julie Upham

Yeah. And if people feel like they're constantly failing, they won't stay. If they feel like you're like, here's a cookie for doing well and you have to keep going, they won't stay.

That's not a healthy culture to keep people. People are doing this because they care. And if you don't give them the feeling of accomplishment or success, they won't stay in that environment.

It's incredibly important and managers need to let themselves feel it too. I think that's also, we're not always hardwired to do that, but it is definitely a huge part of retention and keeping your staff too.

Greg Sobiech

When did this clarity reveal itself to you? When I look at myself when I was in my 20s and 30s as a manager, like I was a pretty terrible manager. I really didn't know what I was doing.

And kind of a little bit shame on the places I worked for. No one ever trained me, which happens all the time. We just get promoted into these roles and no one tells us anything.

But then you learn over time and you reflect this idea of, I need to really go back to my team's passion points. I need to think about these weekly check-ins. I need to listen and communicate with them, maybe over-communicate, or I need to properly dose the mission so I don't overdose the team.

I don't overwhelm them. Was there a time in the past where some of these things came together for you or maybe there was a breakdown that led to a breakthrough?

Julie Upham

Yeah, it definitely being a parent had that. Having my first child, I was traveling until two weeks before he was born because I just felt like I had to go, go, go. And then when you have that child in your life, you're like, well, I'm not sleeping now.

So that was a turning point for me of, wow, I've got to balance both of these jobs of being a parent and a good employee and manager. But also on a less happy front, I've lost both of my parents. And having that time was right after my first son was born.

I lost my dad six months later. And it was this, I'm figuring out how to do a high-level job. I now have an infant who doesn't sleep and my father is sick.

So it was this moment of, I'm trying to balance all of this. And I had a bit of a manager who wasn't plugged in or didn't really know how to respond. And it was burning from all ends.

And I felt very unsuccessful in what I was doing. Now, that was an aha moment for me of like, let's talk to people, find out what's going on in their life. How can I possibly be helping as a manager and help them live as humans first?

Now, fast forward, because I didn't have a great example, I'm trying to do that for my team. After my youngest was born, my mother was sick. So I was pregnant, trying to do a high-level job and taking care of a mother, the sandwich generation that we face at our age.

And my mother passed away before my daughter was born. But the difference, my boss was checking in with me every step of the way. What do you need?

How are you doing it? Do you need to let something go? She gave me the permission to be a person first and then be able to do my job because she knew I could do my job and be successful.

And those two times have really stuck with me. If I know as best as my team will want to tell me and finding out what excites them, but what also may be impacting them on their lives, it's the opposite of a passion point. What's hard for you?

It helps me let them be people. And by doing that, they want to do better. They want, they feel connected and thankful for that.

And it's not, that doesn't feel like rocket science, but I'm seeing it all over the place where you're just not checking in. You're not checking in with people, what's hard for them. There's a lot of hard things happening right now.

And you can't do that if you don't talk to your people. And those are my two points, like really in my career where I've had this moment of like, yeah, this is absolutely what you need to do.

Greg Sobiech

I'm very interested in this idea of, is it more important to hire the right people or train people? And I think the lazy answer is, yeah, of course, it's more important to hire the right people because training is hard. And yet it's so hard to hire people period and to know who they are because we're all so complex.

The only way to actually get the best out of people is with the right amount of training, but you can't train someone to really give a damn about their team. I wish there was a way to have a training program for managers to teach them to somehow innately, like give a damn about the people that they report to them. Because I almost feel like there are many ways to show that I care and it can be very individual.

But how do I teach someone to really pay attention to those who lean on them for guidance?

Julie Upham

Yeah, it's a bit of the discipline thing that we were talking about of the just have that muscle memory of checking in. And as you get to know a person, same thing, as you get to know your donors as humans, you know what makes them tick. Having that muscle memory of checking in with your team and talking to them about people first will make you give a damn as a person.

Now, if it doesn't, there's something wrong with you and maybe you shouldn't be managing others, but it's that check-in, that connection point of always being able to just have that

moment. My team, we have goals for our team of managers and making sure their first year of management, they're going through a training. Their first year of managing, they have a buddy with a more senior manager that is not in their reporting line that they can talk to and ask questions and have someone else mentor them a little bit in that first year.

The good, the bad, and the ugly that comes with management, it's being able to have that person who can, one, remind you to be disciplined, but also be vulnerable as a manager. Like, this is hard. What do I do?

What do you do? And just having some of those securities in place, it helps those managers grow and helps them feel successful as a manager, which will then keep their team if they're feeling good with their managers.

Greg Sobiech

That resonates. I have a phrase I often use, which is motivation follows action. So how I always explain this to my kids, for example, I'll say, hey, remember when I used to take you skiing and you used to kind of hate me for it because we would wake up at 6 a.m. on a Sunday. And we lived in New York back then in Brooklyn. So that was even worse to drive two hours west or north. But now they love it because they can ski.

And now they're motivated to ski because of the action we took. And I think what you're saying is that maybe it's okay if I, and whether I'm in my 20s or in my 40s or 50s, maybe it's okay that I don't innately feel deep, let's just say interest in the lives of my team. But if I go through the process of asking during those weekly check-ins, how was your weekend?

Or maybe once a quarter I ask them, what is your passion point? You told me it's this. Is it still the thing you told me last quarter or last month?

Or maybe something has changed. And if I lean into the process of having those conversations, I lean into that action, maybe that motivation actually will follow. Maybe it's a muscle I need to develop.

Julie Upham

Yeah. You wouldn't run a marathon. I'll go back to my running.

You wouldn't go run a marathon without training. And it's the same thing of having your team of just keep doing the action and being able to repeat, I'm doing this, I'm checking in. We have quarterly check-ins as well.

And we sometimes call them stay interviews with our top performers. And this is, what is something that would make you stay? What is something that would keep you here?

And some people are like, nothing, I'm doing great. Some people are like, well, I saw this thing. I want to try this new challenge.

Maybe we can deliver on that. Maybe we can't, but at least we know now that if they're saying stay, if that's a possible weak point, I need to fill that hole because someone else will. And nonprofits, they want good fundraisers, they want good team.

And if you're not filling that for them, someone else will. And that is a discipline that we have an action that we do or those stay interviews. But then also one of the other actions that we do, what are your roadblocks?

What are your hurdles? And being able to understand now as a manager, I might not be able to get them all out of the way, but at least I know what's making their job harder to be able to smooth the path, get the hurdles out of the way and let the fundraisers run. And if I can't do that for them as a manager, it's going to keep feeling harder.

It's going to bring in fewer dollars if they're not able to be successful. And again, if they're just having constant challenges and roadblocks and someone else doesn't, they'll go to the someone else who doesn't. They'll leave.

I've seen that time and time again with people who work for me. Now, grass is not always greener, but it's the perception of this is hard, I can get better over here. That is a big reason people will leave you.

But you have to ask, you have to have that action to be able to get the motivation as a manager to keep their team.

Greg Sobiech

So let's imagine that I don't have stay interviews in my organization. Tell me more.

Julie Upham

Yeah.

Greg Sobiech

Who gets them? How are they conducted? And how are they different than maybe check-ins with someone who isn't a top performer?

Julie Upham

Yeah. So we go through our entire team, succession planning. You know, that's not always if they leave, what do we want to do to keep them and grow them?

So we identify those that are either our top performers, but the ones we want to invest in the most to keep them in their roles. And those are the ones that we'll target for stay interviews. Now, that sounds a little cutthroat, but I need to keep those top performers in my organization to keep driving and inspiring others.

So we identify that. We do that as a leadership team twice a year for our entire team. And those are the questions of stay interviews.

Now, sometimes the direct managers aren't able to do that or don't feel comfortable with it yet. So then we, as the leadership team, we may go have those conversations like, Coordinator, let's go get coffee. Let's talk about that.

And that's a little bit, again, of the discipline of we're trying to do this, of being able to make sure our team is connected, the stay interviews. Now, flip side of the non-performers, sometimes it's a gift to release them to their next career. But understanding what do they

want, what's not motivating them, you might be able to help them have their self-realization that maybe they should be doing something else.

Whether it's in your organization or somewhere else, that's okay too. And those are sometimes slightly harder, more nuanced conversations. Those we usually will do maybe in mid-year check-ins, but almost always in performance evaluations of helping them have that realization on their own.

And that's okay too. That's fine to let people find their career because maybe they'll go and learn something else and then they might come back. And that's a great thing.

That's the same thing with donors. If they leave you, but they come back, you get them. You win.

You both win in the end.

Greg Sobiech

You guys must be doing something right at Conservation because you mentioned to me over breakfast that people may leave and then often they will come back maybe some years later. And I think that happened to you too.

Julie Upham

Yep. I'm a boomerang. We have a little club of boomerangs.

I think there's about 20 of us in all different roles. A number of us on our development team, but on the science team, it's being able to give people that freedom. Like, I can't give you what you have right now, what you need right now.

Go find it and bring it back. There's some of our top leadership down to managers within our science team. They'll leave, get things, come back.

I call it the in-between time. My CI days, seven years, gone for five, now back for four. I was like, did that happen in the in-between time?

But I came back. So I still have some of that knowledge management. And yeah, we do because we created as a safe space that people want to come back to.

On our development team, we also feel that acute pain when a fundraiser leaves. I think that's why we've invested so much in these stay interviews, these regular check-ins, because I currently have a major gifts position that's been open for a year and a half. That's impacting bottom line right now.

Greg Sobiech

I'm actually seeing this invisible thread across everything that you're sharing. And sometimes it's easier for someone on the outside to see what we deal with every day. And isn't that obvious to us?

And many of the things that you are bringing up, so weekly check-ins, over-communicating, stay interviews, understanding my team's passion points. We actually spoke when we were doing the pre-interview, we spoke about skip levels and then the boomerang phenomena,

the fact that you guys come back. And I wonder if Compassion International, as an organization, and with you as a member of the team in a key role, there seems to be, and I'm reading into it and tell me this is true, just commitment to process around people.

Is that fair or am I reading into this too much?

Julie Upham

Well, I mean, our mission, we protect nature for people. So I mean, people is, they're always at the center of our work. I think that drives us because we think about our work in the sense of like, what is the greatest impact to help humans and people?

So there is something that does, that carries over to the management side. Conservation world's also very small. So, you know, you may be working somewhere else and come back, like you're always in touch with your colleagues in some way or another.

So I think that's also, you know, factors into the boomerang, but also we're an organization that evolves. You know, we're founded on the, we're nimble. This is what makes us different.

And people may leave because it's not right for them then, but give us five years and we've changed. I had a great CEO when I was at CI the first time, new CEO the second time, and it changed as an organization. So there's, as an organization evolves and adapts to the current state, that can also inspire people to come back.

And we have to evolve to be relevant. The passion that people feel for our mission helps drive the boomerang, but the feeling that they had that they're welcome to come back is also important.

Greg Sobiech

This idea of being nimble. Do you feel that, because I think some, some social impact organizations or mission driven organizations aren't that nimble. Yeah.

And maybe it simply is because they're a little shielded, right? If I'm a publicly traded company, my stock price is for everyone to see. Charities are a little shielded from that, from that, from that level of scrutiny.

Do you think that, that being nimble, because you're right, just by definition, your mission has to be nimble because the world changes so fast. So you have to be reactive in some ways, I would imagine. Do you think that's the reason why the organization does have this boomerang effect?

Like, is there something between the mission and the space you're in and how that actually impacts the engagement and the retention of the people on your team?

Julie Upham

Yeah, I actually think it's more, we're just nimble by, you know, our culture. And we're not small. We have 1200 employees worldwide.

So this is not a factor of like, we're, you know, 50 people and we can do this. We, that is by intention and by culture and values. I don't know if that has as much to do with the people in the boomerang.

I think it's, again, people stay and leave because of their managers. I had a woman on my team who was amazing. And when she left, I found out our CEO had sent her a note just saying, you've been great.

We've loved having you here. Go and learn all the new things. And when you come back, there's a door open for you.

And just the fact that he did that, and I say that when I have great, you know, people leave for a reason or another, you know, the door is open, come back. That I think is what makes it more powerful than the fact that the organization is changing. It's that human to human factor that I think is what, that makes the boomerangs.

Greg Sobiech

Another question, bridge conference. That's something you're really passionate about. Why is that conference so important to you?

And is there a connection between that conference and how you think about retaining your staff?

Julie Upham

Yeah, I'm personally passionate about keeping people in the nonprofit sector. It is hard work. It's not the best pay compared to private sector.

It's that compassion fatigue. People are leaving early career and top of career. And I'm driven to keep people in the sector because we need people.

But bridge conference, it's that opportunity for, you know, education and engagement and learning the new things. And I'm in my second year of co-chairing this conference. It's the largest fundraiser.

I don't know if I'm crazy or what, but it's the largest fundraising conference in the US, 2500 people. It's in the summer here in DC. It's a chance to be bringing people in at all levels, learning something new, and being able to take that back the next day or that Monday when they're back in the office.

Let's bring some new ideas, help your organization evolve, learn what AI tricks you're going to be able to bring to do, be more efficient in your role, learn about marketing. If you're a small shop, being able to bring some best ideas and connections. Now the nonprofit space is very small, but I now have connections where I can reach out to someone across the country.

Hey, what's your gift acceptance policy? Oh, now we need to have an AI policy. And I have the network that I wouldn't have had without being in this kind of space.

Now, as a manager, I am sending my team there. I find that value. One, people want to learn, but it's also, they're bringing me new ideas.

So I invest in them as professionals to be able to have that experience, learn and bring back new ideas. And I think that some managers are scared to do that, but I think it's, you're trusting them to go.

Greg Sobiech

Why would they be scared?

Julie Upham

Oh, because they'll meet someone and they'll take another job. And that does happen sometimes.

Greg Sobiech

So they're scared of growing their team.

Julie Upham

Yeah, they're scared of like people.

Greg Sobiech

Because they may lose their people.

Julie Upham

Yep. And that's, I think that's a little self preservation, but I also think that's really shortsighted of, you know, showing that you're investing in them as professionals that people love it. That is something that they may not realize that they need, but they recognize how great of an impact that was on them.

I sent seven people on my team last year to bridge. And when they went, they planned out their like their whole experience together. So they wouldn't overlap and they get as much as possible.

And then when they came back, they were expected to teach the rest of the team. So it was this investment in their growth, but then it had the ripple effects for the rest of the team as well. This goes into my passion beyond my own team.

I need people to grow and stay and want to keep doing this good work. Yeah. So that's where I'll be this summer end of July.

It's a bridge conference.

Greg Sobiech

What are the dates?

Julie Upham

It's July 30th through August 1st. National Harbor, D.C. Bridge conference.

Greg Sobiech

So we are absolutely gently plugging the conference. Absolutely. Shamelessly.

Julie Upham

Shameless, shameless.

Greg Sobiech

But again, I will say your point about not only did your team of seven last year plan which sessions to go to so they wouldn't overlap, but they actually came back and summarized their insights, their learnings, and shared them with each other. My judgment is that Conservation International is committed to process around people. I do think that there's something happening internally that's special where you guys are committed to just executing these steps around your teams.

Because again, if I ask managers or leaders of teams in the industry, how many of your teams went to conference and summarized the insights, I wonder how many would say I have. My guess would be very few.

Julie Upham

Or they invest in one person going. There's conferences you can't possibly go to everything. You can't, you know, these sessions I've been going and now I speak at conferences.

I don't get to experience the full thing. But if I have a handful of other colleagues with me, we can maximize the experience and then bring it back to the team. Yeah.

The education part in this nonprofit sector, it's important for us because if everyone is learning new things and how to do their job better, we all benefit from that.

Greg Sobiech

When you kind of zoom out and you look at just trends in giving, I always like to ask you about this. What's a big trend that you're paying attention to right now?

Julie Upham

Oh, fewer donors giving. That is something we track on. There are fewer donors giving.

I mean, you see this in GivingUSA. Now some of them are giving more and that's skewed by the Mackenzie Scotts of our world. You know, the bigger mega donors.

There are fewer people and economic impacts that, but it's also perceptions of their economic ability to give. I track that, you know, at our end of fiscal year going into the summer. How are they doing?

We track that around elections. I track that at calendar year end and we have ambitious goals to grow the number of donors. We've lowered those expectations in a way of like, okay, we won't have this exponential growth because they just don't exist.

But the donors that are there, I want to be their choice for having a conservation impact. But I can only do that if I know the donors. And this is where the retention side is so important.

People want to give, but they may only give to one instead of four or five different organizations out there. I don't see this trend changing. There's fewer and fewer.

So you have to know your donors and keep them.

Greg Sobiech

Now that's obviously a little terrifying, right?

Julie Upham

Yeah.

Greg Sobiech

There's no playing around with the fact that everyone that I speak to is concerned with that classic giving pyramid shrinking. And I often call it, it becomes an Eiffel tower. You have these mega donors on the top and they're kind of carrying the weight of the needs that we have as an industry.

And yet naturally we should want to increase the base of the pyramid, right? To make sure the foundation is there, that these donors who may be giving 20 bucks a month right now will give 10,000 in 30 years. Do you think that's happening?

Do you think there's, I don't know, I'm going to use the word hope because it's hard for me to accept the pyramid will keep on shrinking.

Julie Upham

Yeah. Well, for us, we think about that base, that's our flexible funding. Those are unrestricted dollars.

These mega donors that yes, there's more of them, they don't give flexible funding. And that as an organization, you have to have that to be innovative. And it's yes, it keeps the lights on, but it also stymies innovation if you don't have that flexibility.

We see those donors as incredibly important. Yeah. And you have to have the pool to be able to move them up.

And ideally you're moving them up even faster, but a destination could still be that mid-level. If I have someone who's giving \$10,000 unrestricted every year, that's great. Now, let me just find a few more of them doing it.

That's a destination. Not everyone's going to grow to be that top donor and that's okay. But that shoring up of the base is critical.

And I do see some hope in the sense of the younger generation is very passionate. These new donors as they're the 20 somethings and even younger coming in, they want to give back. That is something that is innate in them.

How do we give them the ability to grow with us as an organization? That gets you to your sustainer giving. That makes making it easier to give digitally, text to give.

All those new things that you're hearing about, that's bringing in this new generation of donors. And yeah, I like the Eiffel Tower idea, but I still need that base. I need that strong base.

Greg Sobiech

Is there something that you're really excited about or you want to lean into or you already are leaning into in your role as an organization to broaden the base of that pyramid, to get more donors, to get them started with your mission?

Julie Upham

And for us, our organization in particular has been more of the working with the top donors. That's been how we've worked for the last 30 plus years. But it's this building out of our donor base, whether it's digital.

So we've been investing a lot in digital fundraising and our website's getting overhauled to feel easier to give. We also focused on that mid-level space. We started that program four years ago in earnest of focusing on those donors, and we've seen incredible success there.

So it's these trying of new things, but making sure we have someone in there to also do the work. So text to give, I mean, a lot of organizations are doing that. Great.

We've just started it and we're seeing results. Having that sustainer program, we're really building some community around that and we're seeing results. And it's the, find the things that are resonating with your donors and let's do that well.

That all exists in that base, that unrestricted, flexible support and just focus on that. That's going to keep your organization going. That I think is a trend that people are skewing too far to the major gifts and focusing just on that instead of that foundational support that keeps the lights on.

Greg Sobiech

Well, I imagine that has to be an internal KPI that isn't just about giving. It's about, to your point, unrestricted giving and the share of giving being properly distributed.

Julie Upham

Yeah. Yeah. And giving people the resources to get to those because you can set a goal, but if you don't give them the resources to get to that ambitious goal, they're not going to succeed.

Greg Sobiech

Julie Oppen, Vice President, Individual Giving at Conservation International. Thank you so much for your time. This was a pleasure.

Julie Upham

Great. Thanks for the time and let me talk about fundraising. I love it.