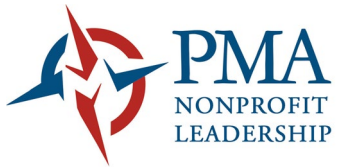



How to Excel as an RDO Leader



Dr. Patton McDowell, MBA, CFRE

November 9, 2023



Where are you on your
leadership path?





Leadership Path

- Emerging Leaders
- Mid-Career Plateaus
- Senior Managers



Why is this important?

We Face Serious Challenges



30% of nonprofit employees are burnt out



2 out of every 10 nonprofit employees are at risk of burning out

Survey: 84 Percent of U.S. Workers Blame Bad Managers for Creating Unnecessary Stress

Nonprofit Development Staff Turnover: Is It a Crisis or an Old Paradigm We Need to Change?

Why is this
important?

*Real
Opportunities
Exist*

350+ University MPA and NPO programs

US has **world's largest nonprofit sector** with more than \$1.7 trillion in revenue (10% of GDP)

2008: nonprofit job rate **4x greater than for-profit**

\$59 trillion of wealth will transfer by 2061



Why is this important? *You Want to Avoid Burnout & Advance!*

How to Excel as an RDO Leader

1. Vision Framework

2. Self-Assessment

3. Strategic Networking

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Importance of Vision



Vision Framework



A brass compass with a silver-colored needle and a red-tipped arrow is positioned over a financial line chart. The chart features a grid and several data points labeled with numbers: 118.920, 380.330, 187.170, and 154.360. The compass is open, showing its internal mechanism and the needle pointing towards the North. The background is a light blue and white grid.

Six Questions to Sharpen Your Professional Vision

1. Timeline
2. Sector
3. Geography
4. Culture
5. Credentials
6. Compensation

#1 Vision Framework Worksheet

VISION FRAMEWORK

Six Framework Elements



2. Sector

In what nonprofit sector are you most comfortable? This could certainly change, but to move this plan from ideas in your head to an actionable document, consider which nonprofit sector you see the greatest potential (i.e., arts & culture, human services, healthcare, education, faith-based, or environmental). If your focus is even more specific, use the added detail in your draft (i.e., K-12 education, career-related healthcare, a faith-based food ministry, etc.). Not sure? Just pick a sector that most resonates with you now.

In what nonprofit sector(s) will your ideal leadership opportunity occur? (i.e., arts & culture, human services, healthcare, education, faith-based, or environmental)



**Access Vision Framework
Worksheet**

Vision Framework: **Personal Case for Support**

Having served as a senior leader at **two RDO's** over the past fourteen years, I'll be ready for an **executive opportunity by 2025**. I want to **remain in my regional community** and continue to focus on **rural capacity-building efforts**. I'll need to demonstrate greater understanding of private philanthropy and campaign strategies and will **seek certification through my local AFP chapter** in the next year. *(Given my experience, I'll be seeking a 20% increase in my compensation and benefits package.)*

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Self-Assessment: 12 Essential Skills and Experiences

Learning Plan

Productivity &
Organization

Strategic
Planning

Sector
Knowledge

Interpersonal
Communications

Management
Practices

Financial
Acumen

Marketing &
Social Media

Governance &
Board
Development

Data
Management
& Technology

Inclusive
Practices

Strategic
Networking

Self-Assessment: 12 Essential Skills and Experiences



Self-Assessment: 12 Essential Skills and Experiences Worksheet

1) Learning Plan

Short- and long-range plan: graduate education, certification, professional development reading

Current Assessment (1-4): 1

Action Items to Improve/Better Leverage This Skill:

- 1) **Obtain a certificate in Business Acumen by the end of 2024 – begin researching three online programs that offer a certificate program**
- 2)

2) Productivity & Organization

Clear system of capture, prioritization, and assessment; time and energy management skills

Current Assessment (1-4): 4

Action Items to Improve/Better Leverage This Skill:

- 1) **Write a LinkedIn article about a productivity ritual that works for me in the next 90 days**
- 2)

1 = Needs Significant Improvement
2 = Needs Some Development
3 = Capable and Effective
4 = Clear Strength



Access 12 Skills Worksheet

Self-Assessment: 12 Essential Skills and Experiences



Learning Plan

Productivity &
Organization

Strategic Planning

Association/Sector
Knowledge

What is **one strength** you can build upon?

Interpersonal
Communications

Management
Practices

Financial Acumen

Marketing & Social
Media

What is **one challenge area** on which you can focus?

Governance &
Board Development

Data Management
& Technology

Inclusive Practices

Strategic
Networking

How to Excel as an RDO Leader

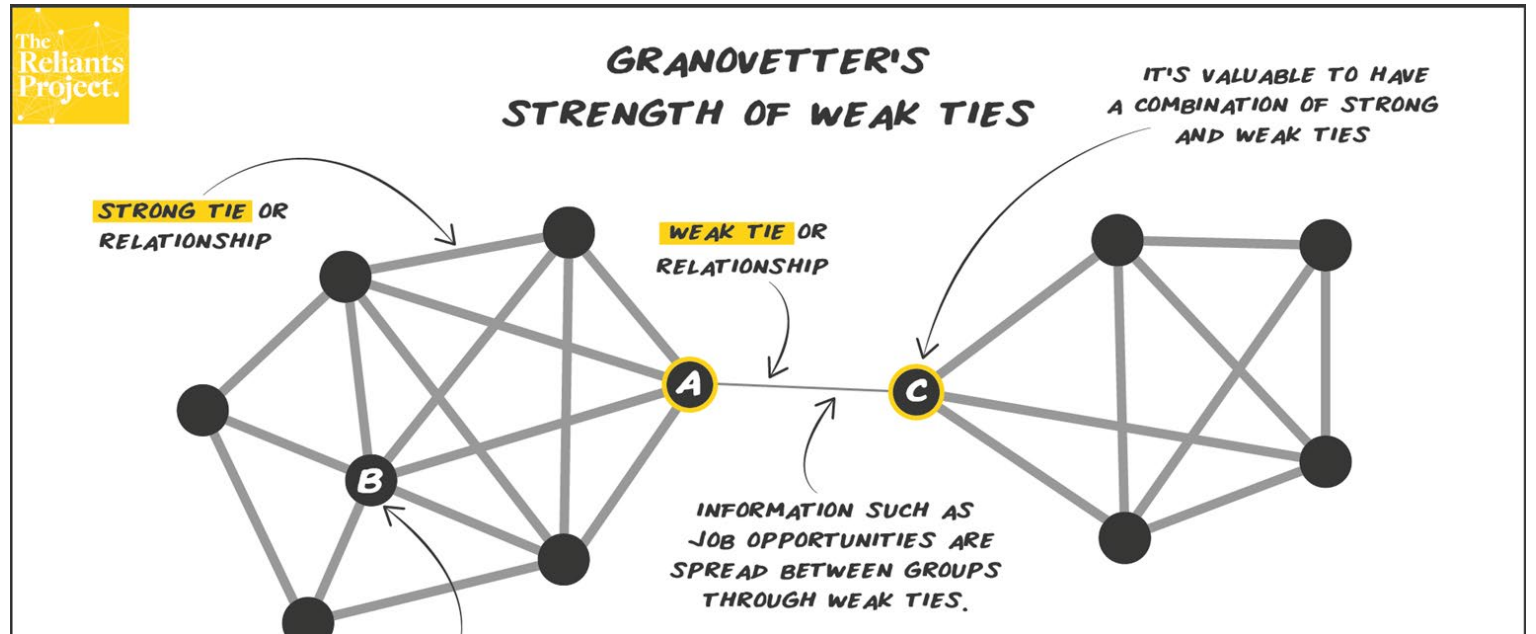
1. Vision Framework

2. Self-Assessment

3. Strategic Networking



Dr. Mark Granovetter

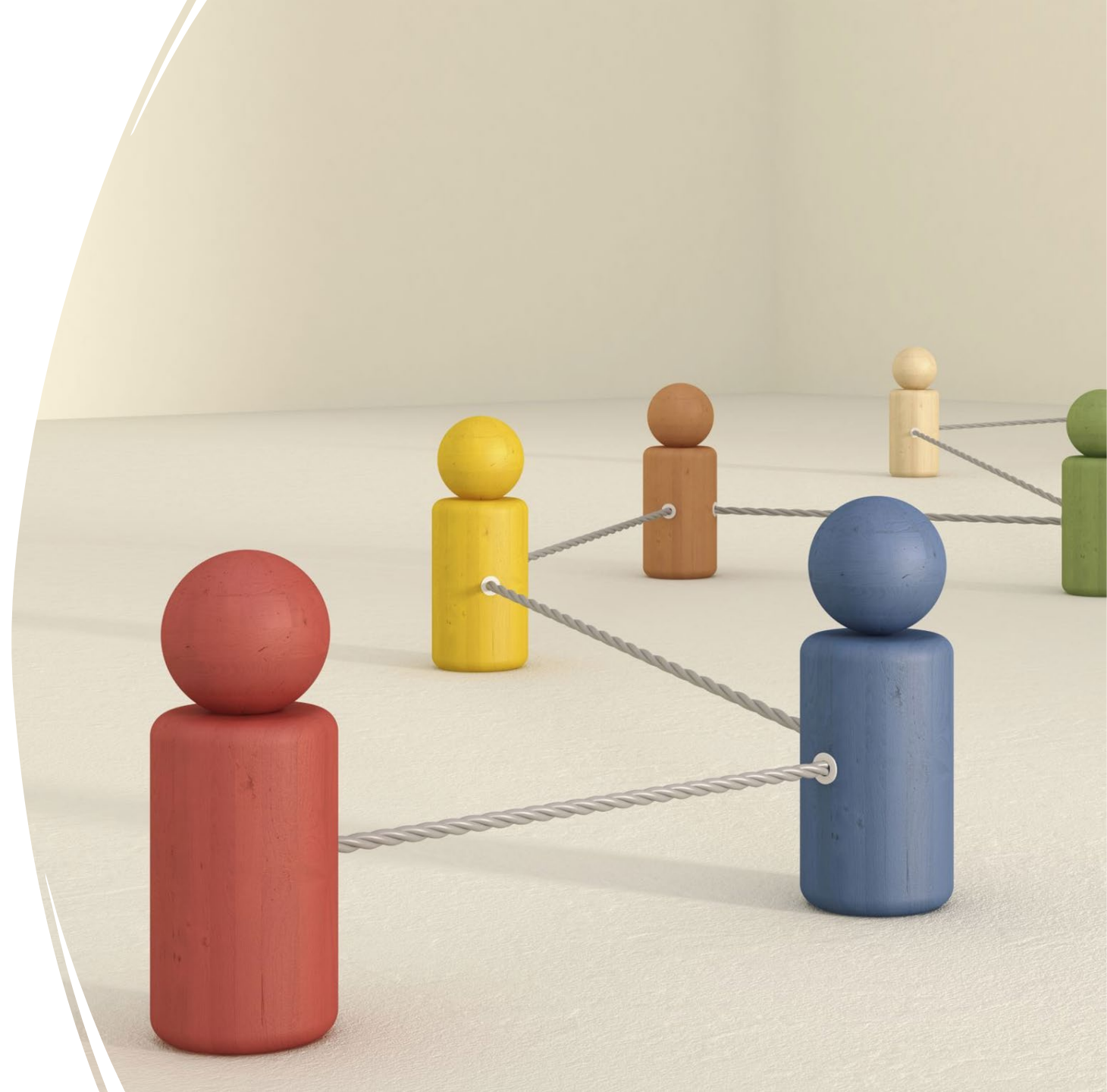


Power of Strategic Networking: Weak Ties

Strategic Networking: Identify Key Colleagues

Two Comparison Colleagues

Two Aspirational Colleagues



Strategic Networking: Do Strategic Interviews

1. **Why** did you get into this work, and what led to your current position?
2. Of what **accomplishment** are you most proud in your current role?
3. What has been your biggest **challenge**, and how did you address it?
4. What **resources** have been most helpful during your career so far?

Strategic Networking: Find Your Mastermind

PMA MASTERMIND



Emily Battle
Nonprofit Consultant
PMA Consulting
Charlotte, NC



Shari Fiveash
Executive Director
OBX Room in the Inn
Manteo, NC



Jamie Green
VP of Finance and Administration
Hope Haven
Charlotte, NC



Kevin Krusiewicz
Integrator/Chief of Staff
The White Rose Resistance
Boise, ID



Glenda Mauck
Head of Development
Teach for America North Carolina
Charlotte, NC



Fard Morales
Regional Director
Inner Explorer
Charlotte, NC



Susan Ross
Director of Development
Matthews HELP Center
Matthews, NC



Robin Taylor
Nonprofit Consultant
PMA Consulting
Charlotte, NC



PMA
MASTERMIND

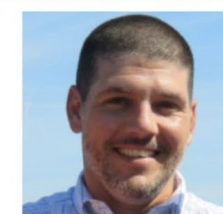
PMA MASTERMIND



Althea Benson
Education Manager
Vital Connections of the Midlands
Columbia, SC



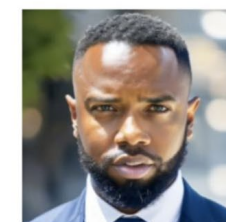
Sandra Rose Conway
Executive Director
Matthews HELP Center
Matthews, NC



Anthony Grillo
Executive Director
The Knothole Foundation
Charlotte, NC



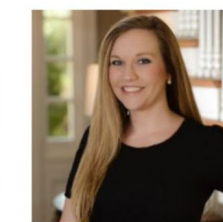
Meneika Helms
Major Gifts Officer
Charlotte Bilingual Preschool
Charlotte, NC



Phillip Miller
Director of Advancement Operations
Crisis Assistance Ministry
Charlotte, NC



Erin Morris
Director of Institutional Giving
Communities in Schools, Charlotte
Charlotte, NC



Blair Reynolds
Director of Annual Giving and
Stewardship
WakeMed Foundation
Raleigh, NC



Susan Sears
Executive Director
Go Jen Go Foundation
Charlotte, NC

FALL 2023: Gold Group

FALL 2023: Diamond Group

Strategic Networking: **Develop Your Personal Board of Directors**

1. Comparable Peer In Your Sector
1. Comparable Peer Outside Your Sector
1. Aspirational Leader In Your Sector
1. Aspirational Leader Outside Your Sector
1. Board Member
1. Subject Matter Expert
1. Personal Subject Matter Expert



Strategic Networking: **Personal Board of Directors Worksheet**

2. A Comparable Peer Outside Your Sector

While sector-specific insight is important to have on your board, someone outside of your sector can also add value. This person can become an even greater asset if they are selected from a sector that is of interest to you. If you are currently in the education sector but know you would consider a leadership opportunity with a healthcare nonprofit, then you would be wise to target someone currently working that area in a role like yours.

Characteristics (e.g., different network, different sector):

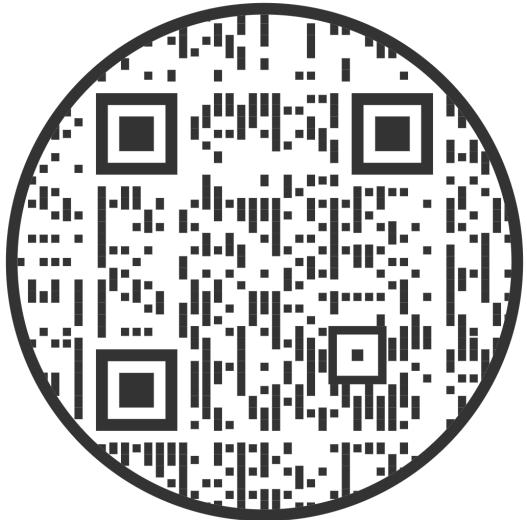
Names? _____

3. Aspirational Leader in Your Sector

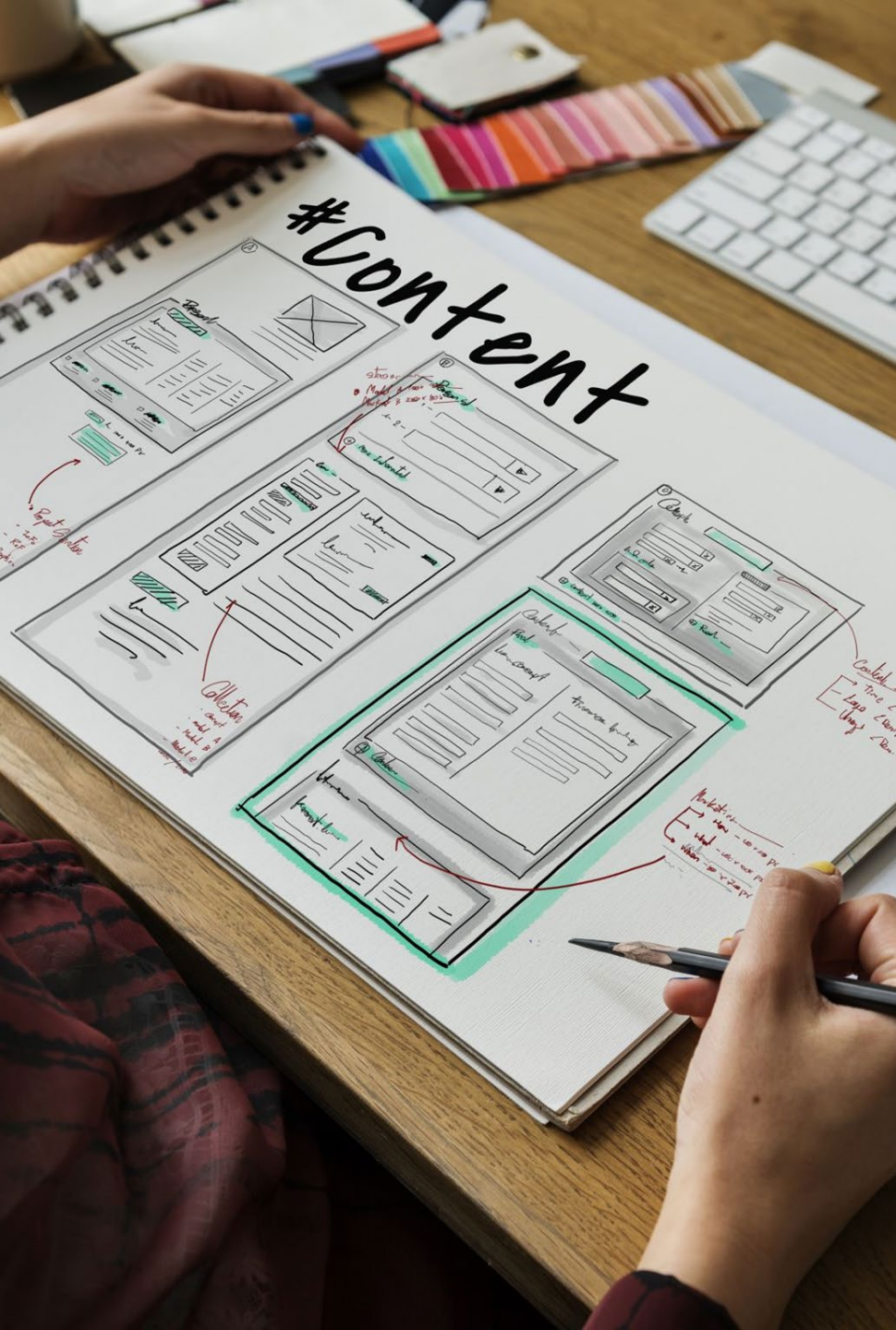
Like the comparable peer in your sector, you want someone who knows the dynamics of organizations like yours, is well connected, and would enjoy a coaching or mentoring-type arrangement. Again, this is someone whom you have likely identified through your targeted networking and is perhaps five or ten years ahead of you on the path toward a senior leadership in the nonprofit sector.

Characteristics (e.g., local network, same sector):

Names? _____



**Access Personal Board of
Directors Worksheet**



Summary: Leadership Lessons

1. Sharpen Your Vision & Coach Someone
1. Self-Assess & Design Your Plan
1. Embrace Strategic Networking & Build Your Board

Thank you

Stay Connected!

PM@pattonmcdowell.com

