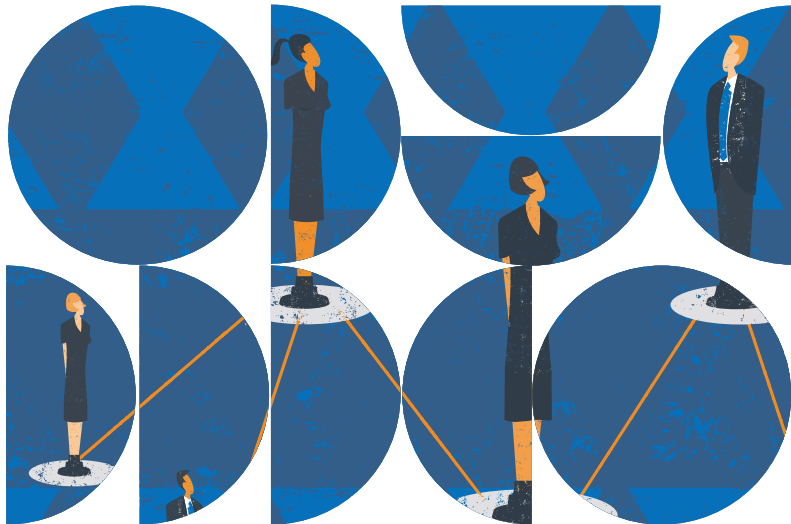





Gifted and Talented

What Makes a Top Fundraiser in the
Age of Venture Philanthropy?

Advancement
Forum





As large-dollar and mega gifts account for an ever-increasing share of the philanthropic landscape in higher education, the **major gift officer** (MGO) has become even more critical to institutional fundraising success.

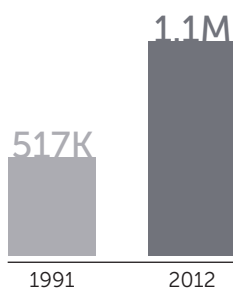
Given the time and costs involved in hiring and developing MGOs, each position represents a significant investment for the organization, with the cost of failure being delayed proposals, missed solicitations, wasted training time, and disrupted donor relationships. As a result, chief advancement officers are increasingly looking to understand the attitudes and behaviors associated with successful MGOs.

In response to this state of affairs, EAB embarked on an 18-month research initiative to answer the question: “What makes a top fundraiser in the age of venture philanthropy?” Unlike most prior research on human capital in advancement, this study utilized a balance of quantitative and qualitative methodologies to discover what drives MGO performance and help our members develop a new human capital strategy. What it revealed—and the associated prescriptions for a new approach to fundraiser selection—holds the potential to enhance your MGO interview process.

Not Your Dad’s Philanthropy

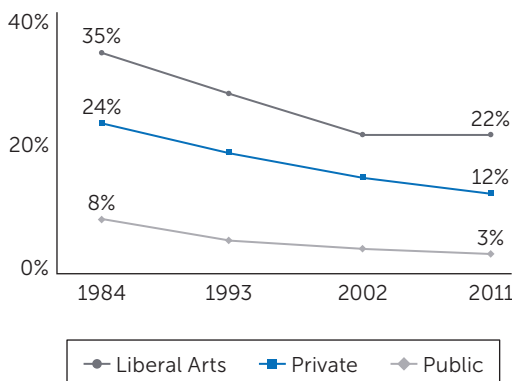
The higher education fundraising landscape has changed dramatically over the course of the past 25 years. First, the number of U.S. nonprofits has more than doubled since 1991, expanding job opportunities for top fundraisers. Additionally, the proportion of gifts that are unrestricted in nature has declined considerably, likely due to stronger donor interest in directing funds to specific initiatives and programs. Finally, there has been a tremendous shift in the gift pyramids of most institutions, with a significant uptick in the portion of campaign funds that the top 1% and top 10% of donors represent. This necessitates an even closer look at the cultivation of prospective major and principal gift donors.

Registered 501(c)(3) Organizations

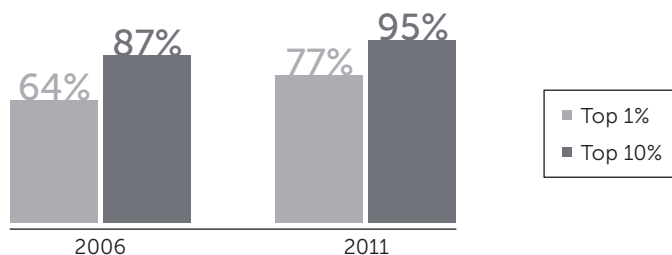


Percentage of Private Support Directed to Unrestricted Funds

Voluntary Support of Education Survey, 1984–2011



Percentage of Total Campaign Dollars Provided by Top Donors



The impact of these factors has been compounded by a transformation in giving trends by age group. The majority of your outright gifts are most likely already coming from the Baby Boomers, who have very different giving preferences than those of previous generations.

Baby Boomers, Generation X-ers, and Millennials are different than the Silent Generation. They care more about accountability and are increasingly pursuing what many call “venture philanthropy,” essentially treating their gifts as they would a pool of funds at a venture capital firm. While they seek a social return rather than a financial one, they are nevertheless looking to maximize quantifiable impact.

Generic Giving Preferences: Cygnus Donor Survey, 2012

n=11,900

Age	Impassioned Plea	Clear Case or Gift	Measurable Results from Gift
65+	✓		
35–64		✓	✓
Under 35	✓	✓	✓

These changes in donor demographics and preferences have profound implications for university fundraising, and the types of people needed to fulfill the mission. Indeed, if donors have changed, shouldn't our understanding of what it takes to be a top performing fundraiser change as well?

“**Venture Philanthropists Seek ROI**

Our entrepreneurial background influences our approach to philanthropy...to make our giving more effective, scalable, and sustainable. The return on this investment is stronger, more resilient communities.”

Paul Orfalea, Founder
Kinko's (now FedEx Office)

Gifted & Talented MGO Research

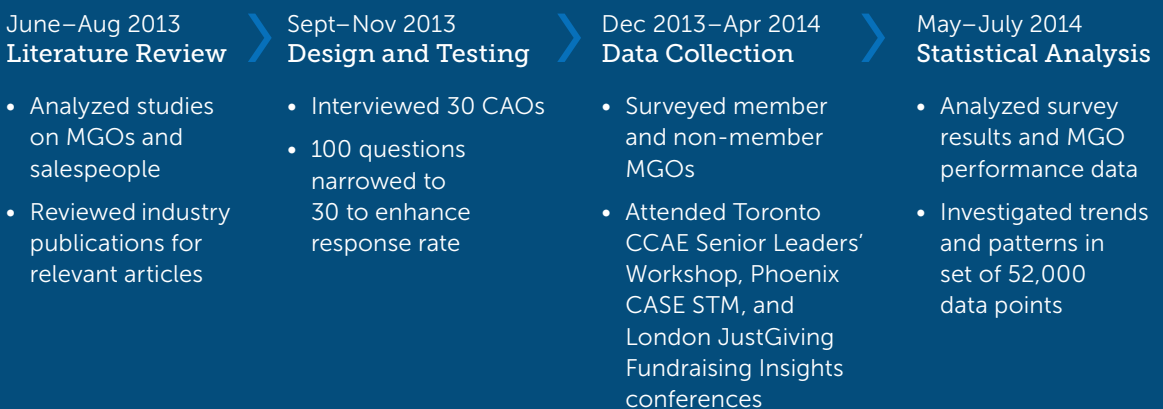
Our study began in July 2013, with an extensive literature review on the topic of major gift officer human capital. The most surprising finding was that so little in the way of methodologically rigorous research had been conducted on this subject. There was data from the sales world and anecdotal evidence from advancement, but no large-scale study had ever been conducted on a critical mass of MGOs from a diverse group of institutions.

After building terrain expertise, EAB worked with 30 chief advancement officers and MGOs to better understand the daily work of MGOs and what kinds of hypotheses they wanted to test. We started with a list of 100 survey questions and whittled it down to 30, in order to ask major gift officers themselves what they believed the ingredients of success were among individuals in the profession.

The next five months was the most intense period of the study, as we finalized the survey, distributed it to participating institutions, and then collected performance data.

Finally, we worked with an in-house data scientist and used programs like SPSS and Tableau to analyze and visualize the data in interesting ways in order to find clues among 52,000 data points.

EAB Study Methodology and Timeline



Survey Methodology

From Coast to Coast and Across the Pond

Over 1,200 MGOs participated in this research study from 90 colleges and universities across 32 U.S. states, seven Canadian provinces, and England. It is thus the largest study of its kind ever undertaken. Perhaps more importantly, a diverse mix of higher education institutions were represented: large and small, public and private, rural and urban—schools from across the Carnegie classification spectrum.



\$7.1B

Amount raised in FY13 by participating institutions

52,000

Data points generated

1,217

MGO respondents

90

Participating colleges and universities

Participating Institutions

- > 34 U.S. Public Research
- > 23 U.S. Private Research
- > 18 U.S. Master's
- > 3 U.S. Baccalaureate
- > 10 Canada
- > 2 England

MGOs need to be “Curious Chameleons.”

We performed a cluster-factor analysis of the 52,000 data points we collected, which didn’t initially indicate significant differences between high- and low-performers. So we decided to dig deeper into the data to find patterns among the most successful MGOs. Our analysis—along with the information culled from 200 interviews—revealed that the highest performing MGOs were what we termed “Curious Chameleons.”

Who Is a “Curious Chameleon?”

The Curious Chameleon is an amalgam of four key profile attributes: behavioral and linguistic flexibility, intellectual and social curiosity, the ability to distill information, and the skill to strategically solicit prospective donors. Behavioral and linguistic flexibility involves the skill to modify one’s disposition, communication, and mannerisms based on the audience. Intellectual curiosity is the drive to continuously enhance one’s knowledge, while social curiosity reflects a natural inquisitiveness with regard to people. Information distillation skill relates to an individual’s capacity to quickly zero in on relevant information when confronted with a deluge of data. Finally, strategic solicitation is the ability to approach the solicitation process with a strategic mind-set. **These four profile attributes were disproportionately represented among top-performing fundraisers.** Before we examine each attribute, it may be helpful to compare this profile to one found in a more familiar personality assessment tool, the Myers-Briggs Type Inventory.

▶ BEHAVIORAL AND LINGUISTIC FLEXIBILITY

The skill to change speaking style and behavior depending on the audience

▶ INTELLECTUAL AND SOCIAL CURIOSITY

The thirst to learn more about people, places, and things

▶ INFORMATION DISTILLATION

The ability to recognize, curate, and communicate relevant information

▶ STRATEGIC SOLICITATION

The confidence and skill to artfully ask prospective donors to make a financial contribution

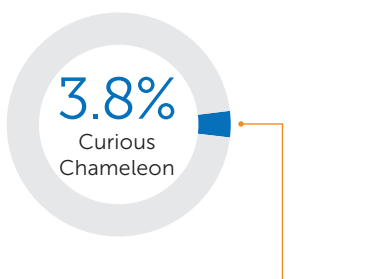
Are Curious Chameleons an ENTJ Avatar?

Curious Chameleons were represented in the survey sample at nearly the same rate as the ENTJ personality type, one of the 16 personality types on the Myers-Briggs assessment. The ENTJ is someone who is extroverted, intuitive, thinking, and judging. This is the second-rarest personality type and indicates that someone is achievement-oriented, confident, assertive, and motivated. The Curious Chameleon and the ENTJ have much in common in terms of what their personalities are like.

But it wasn't just that they had much in common substantively and in terms of how rare they are in the general population. We found remarkable similarities when it came to their levels of representation among high-performing fundraisers.

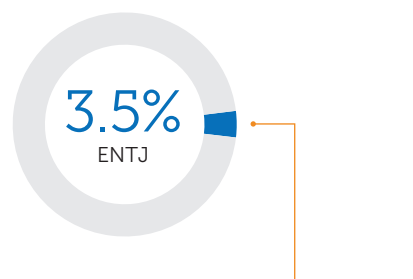
Curious Chameleons were substantially more likely to be in the high-performing bucket of MGOs who took the survey. **They had 49% higher odds of being in the top third of MGOs and 78% higher odds of exceeding goal.**

Proportion of "Curious Chameleons" in EAB MGO Survey



- Linguistic and behavioral flexibility
- Intellectual and social curiosity
- Information distillation skill
- Strategic solicitation ability

Proportion of Myers-Briggs Types in U.S. Population



- Gets energy from interacting with others
- Extroverted but highly reflective
- Sees big picture
- Confident, assertive, and motivated

Additionally, we found strong anecdotal support for the overrepresentation of ENTJs among top-performing MGOs. A book written by an advancement consultant describes professional development sessions offered by Indiana University's Center on Philanthropy to senior development leaders—these are individuals who are obviously much higher-performers than average MGOs. Even though ENTJs account for only about 4% of the general population, they were nearly 60% to 70% of advancement leaders. Over the course of the past year, EAB's research team has seen this finding validated by dozens of chief advancement officers attending our executive roundtable meetings.

“ENTJs Reign Supreme Among Development Leaders

I was fascinated by an exercise conducted at the Executive Leadership Institute at the Indiana University Center on Philanthropy. The participants, all senior development officers, completed the Myers-Briggs Type Indicator. They were strikingly similar in their profiles; 60% to 70% of them registered as ENTJs... The workshop leader later commented that this finding was remarkably consistent with each group of development leaders that took the survey.”

Steve Klingaman
Fundraising Consultant

The Curious Chameleon

More Flexible Than a Yogi

The first key profile attribute of the Curious Chameleon is behavioral and linguistic flexibility. Behavioral flexibility involves adapting behavior to make others comfortable, while linguistic flexibility is the ability to change language depending on the audience. Our research team interviewed an associate vice president of development at a large private research university who told us that when he was an MGO, he once flew to Florida to meet with an 85-year-old woman in her 80-degree condo. He spent two hours reminiscing with her about good times at her alma mater while sipping warm Tab soda. Immediately afterward, he rushed to downtown Miami to meet with a lawyer with whom he had only 30 minutes to get in, make a compelling case for a gift, make the ask, and get out. This example illustrates the demands on MGOs to be adaptable to a variety of circumstances.

There's a reason we use the term "audience" rather than simply "prospective donor." Though the donor pool is certainly becoming more diverse, hiring managers need to also be mindful of the diverse array of other individuals with whom an MGO interacts on a daily basis, from faculty to deans to prospect research colleagues and others.

But it's not just the ability to be flexible in one's behavior that's important. The ability to change speaking style is also important. Sociologists have long used the term "code-switching" to capture the idea of linguistic dexterity. Code-switching is the ability to change the way you speak based on who you're talking to.

BEHAVIORAL AND LINGUISTIC FLEXIBILITY

Key Attribute #1:

Linguistic dexterity is the ability to change language depending on the audience. Behavioral flexibility involves adapting behavior to make individuals comfortable.

Examples in Practice

- Using cultural awareness to tailor approach to prospective donor from Taiwan
- Waxing nostalgic with a retired alumna who wishes to reminisce about her alma mater and then making a compelling 30-minute pitch to a busy attorney
- Working with the dean to host an alumni event and then meeting with a prospect to discuss charitable remainder trusts

Any of you who speak a language other than English know the feeling of speaking to someone in English and then unexpectedly uttering just a single sentence in a shared foreign language and immediately seeing his or her eyes light up and demeanor change. But code-switching isn't merely changing the formal language you're communicating in—it also involves changing the way you communicate in English.

Some people would argue that this smacks of inauthenticity. But MGOs who successfully apply this principle and exhibit this behavior don't change who they are based on the prospect; they merely selectively choose which side of themselves to showcase.

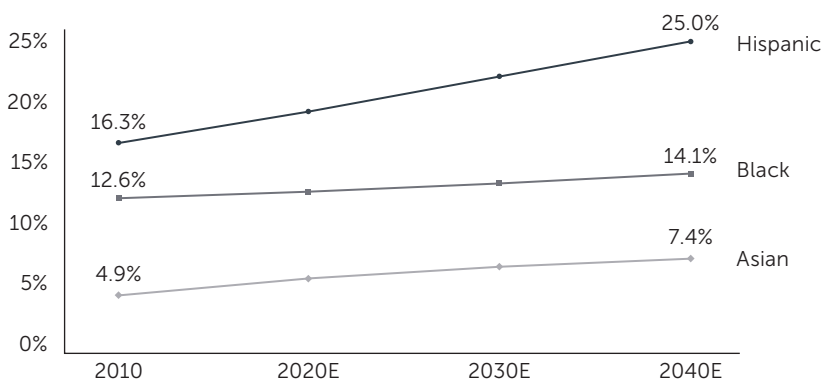
Linguistic and behavioral dexterity are important skills to have in 2015. But they will become even more valuable in the next few decades.

A Demographically Different Future

Demographic changes across North America will render behavioral and linguistic flexibility critical for the advancement professional. Hispanic Americans are expected to be nearly a quarter of the population by 2040, up from just over 15% in 2010. The representation of Asian Americans will increase substantially.

Projected U.S. Racial Composition

U.S. Census Bureau, 2010–2040



With an increasing proportion of donor dollars coming from ethnic minorities, the LGBT community, foreign prospects, and women who have acquired their wealth independently, it is critical to recognize that adapting to the unique needs, preferences, and backgrounds of diverse groups can have a positive impact on your advancement organization.

One interviewee, a vice president of advancement at a large Canadian university, shared that one of his top-performing MGOs was someone who formerly worked as a bartender. His theory was that people who are used to dealing with individuals from a diverse range of backgrounds could adjust themselves appropriately during conversations with prospective donors. High-net-worth individuals usually have a unique story behind the acquisition of this wealth and typically appreciate spending time with other people who have had conversation-worthy life experiences. In short, interesting people like to be around other interesting people.

A Larger Slice of the Top 1%

26%

Of Giving Pledge signers are ethnic minorities, immigrants, or non-U.S. residents



1.46

Rate by which Asian Americans are over-represented among top 1% U.S. income earners



35K

Number of Black American millionaires

“**Pliability with Prospects**

Flexibility is incredibly important. One of my MGOs might have to meet with an extremely conservative older rancher one moment and a hip artist the next. He or she must be adaptable and perceptive, and have an ability to read the audience.”

Brett Anderson
VP, University Advancement
Colorado State University

The Curious Chameleon

Intellectual and Social Polyglots

The next attribute of the Curious Chameleon is intellectual and social curiosity. The key point here is that it is both intellectual and social curiosity, not just one or the other.

We interviewed an associate vice president of development who told us about his top-performing MGO, who woke up every morning and couldn't wait to read *The Chronicle Of Higher Education*, *Tech Crunch*, and the *Wall Street Journal*. We weren't totally surprised when hearing this, as we assumed this MGO was simply doing so to stay abreast of developments in the worlds in which her prospective donors traveled. What surprised us is that he told us this MGO didn't do all this reading for any instrumental purpose—she did it simply because she was passionate about learning more about a breadth of issues.

This drive to learn more about people, places, and things—which often results in an MGO becoming a “Renaissance man or woman”—enables a fundraiser to draw connections between issues, concepts, and ideas that others think are quite disparate.

In 2005 Steve Jobs gave a commencement speech at Stanford University in which he discussed the profound impact this principle can have. His point, in short, was that the ability to connect the dots between seemingly dissimilar ideas or concepts is at the root of successful innovation. Though he was clearly not talking about MGOs, we believe the lessons he offered are transferable to fundraising.

After all, the success of your MGOs lies in their ability to make non-obvious connections between the intellectual, social, economic, and career-related interests and ideologies of prospects and the activities in which the faculty, students, administrators, and others on campus are engaged. Wanting to accumulate information is a critical desire, but given the information overload we now deal with, it's equally important that MGOs know how to identify, curate, and communicate this information.

INTELLECTUAL AND SOCIAL CURIOSITY

Key Attribute #2:

Intellectual and social curiosity involve a thirst to learn more about people, places, and things.

Examples in Practice

- Staying abreast of the practices and people of Wall Street, Hollywood, and Sand Hill Road
- Connecting a prospective donor's comment about board work with an animal advocacy group to cutting-edge university research on lab-grown meat
- Probing prospects by asking thoughtful, insight-generating questions about their goals and interests

“**The Inquisitive Individual**

My best director of development wakes up each morning and reads *TechCrunch*, *The Wall Street Journal*, and *The Chronicle of Higher Education*. She doesn't do this because she plans to strategically use the information she gleans from the publications. She does it simply because she has an unquenchable thirst to learn more.”

AVP, Development
Public Research University

“**Connecting the Dots**

[I learned about] serif and san serif typefaces, about varying the amount of space between different letter combinations, about what makes great typography great. If I had never dropped in on that single course in college, the Mac would have never had multiple typefaces or proportionally spaced fonts... Of course it was impossible to connect the dots looking forward when I was in college. But it was very, very clear looking backwards 10 years later.”

Steve Jobs
Founder and Former CEO, Apple Inc.

The Curious Chameleon

Seeing the Forest for the Trees

Curious Chameleons have the ability to distill important information from the flood of data they face on a daily basis. They need to be fluent in isolating relevant data points to guide their decision making on matters like gauging solicitation readiness of prospective donors or determining the potential ask range for a gift.

Part of the challenge of working with prospective donors in the 21st century is the need to be highly proficient in isolating relevant information and presenting it to them. So while intellectual curiosity is helpful, the disciplined thought that comes with a solid understanding of data, analytics, and research is also necessary.

However, both curiosity and information distillation skill don't amount to much if fundraisers can't convert relationships into gifts.

INFORMATION DISTILLATION

Key Attribute #3:

Information distillation includes the ability to recognize, curate, and communicate relevant information.

Examples in Practice

- Identifying patterns in prospect giving, event attendance, and institutional affinity to effectively allocate time among prospects
- Synthesizing information from wealth ratings, prospect research, and personal observations to determine a potential ask range for a gift
- Competently explaining the return on investment a prospect can expect on a gift

“Separating the Wheat from the Chaff

The ability to navigate the flood of information to inform decisions is critical to the success of a major gift officer.”

Ben Tompkins
AVP Operations, Emory University

Strategic Solicitation

The last key attribute of the Curious Chameleon is strategic solicitation. This largely revolves around comfort with (and even interest in) soliciting prospective donors for gifts. One recurring theme that came up in our research interviews was the idea of the somewhat pejoratively named “friendraiser,” the individual who could successfully cultivate relationships but ultimately couldn’t make the ask. Friendraisers develop strong relationships with prospects, but struggle with converting these relationships into financial support for the university.

But beyond being comfortable with the ask, strategic solicitation also includes approaching the solicitation process in a very deliberate fashion. One associate vice president of development shared with our research team that her top MGO enters conversations with donors being explicit about her role as a fundraiser, but that she emphasizes in her first meeting that she simply wants to better understand what the prospective donor is passionate about so she can appropriately identify funding opportunities across campus.

STRATEGIC SOLICITATION

Key Attribute #4:

Strategic solicitation involves the confidence and skill to artfully ask prospective donors to make a financial contribution.

Examples in Practice

- Strategically asking prospect for specific amount for a particular project based on all available intelligence
- Remaining comfortable with silence and the constructive tension it can build
- Handling solicitation rejection without taking it personally

“Always Be Closing

All the identification, qualification, and cultivation in the world isn't very helpful if it doesn't eventually result in solicitation. It may sound crass, but the reality is that we're in the business of raising money, and not simply building relationships.”

VP, Development
Private Master's University

From Theory to Practice

Recalibrating Your Hiring Process

While understanding the key profile attributes of a Curious Chameleon is helpful in planning MGO hiring and professional development, EAB's focus on pragmatic research necessitated discovering how advancement shops have designed and deployed innovative methods of testing for Curious Chameleon key profile attributes.

One of the reasons interview exercises and activities have significant potential for MGO selection is that our research uncovered just how difficult it is to ascertain how good of a fundraiser someone will be. Many people can skate by on talking the talk, and there's often no way to verify claims they make.

The profiles on the following pages feature institutions that have introduced innovative practices into their fundraiser selection process. As we learned more about these practices, it became clear just how aligned with the Curious Chameleon key profile attributes they were. We also believe they represent a strong return on investment, particularly given the minimal time and resource commitment.

Dartmouth Uses Role-Play to Test Flexibility and Solicitation Skill

For nearly a decade, Dartmouth College’s leadership annual giving team has been using a set of exercises to ascertain job candidate fit with fundraising roles. The leadership annual giving officers make asks of \$50K to \$2M, so we think this exercise is quite transferable to the major gift officer candidates in your pipeline.

Before the interview, the candidate receives an email with a description of what will be expected during the interview, along with biographical information on a fictional prospect who is an alumnus of Dartmouth College.

The activity, the details of which you can see below, tests the entire range of Curious Chameleon key profile attributes.

Activity:	Tests for:
Prospect profile review and strategy discussion with two staff members (25 min.)	Intellectual and social curiosity; information distillation skill
Role-play with prospect, including ask (20 min.)	Behavioral/linguistic flexibility; strategic solicitation
Debrief discussion (5 min.)	Self-awareness
Memo to management with summary and next steps (10 min.)	Action orientation

First, the candidate has 25 minutes to review the prospect profile and strategize with two colleagues. Next, the candidate moves on to a role-playing exercise with the senior managing director, who plays the part of the prospect. The most important part of this role-play is that after the candidate makes the solicitation, the director deliberately rejects the ask to see how the candidate will respond. Does she get dejected? Or does she bounce back, perhaps even offering a counterproposal?

After the role-play, the interviewers measure the candidate's level of self-awareness by asking her to reflect on her performance. Finally, the candidate gets 10 minutes to produce a memo to management that summarizes what was learned during the solicitation and recommends next steps to further cultivate the prospect.

What our research team found most interesting about this set of activities is that it enabled the hiring manager to test many skills and traits in a single hour. Specifically, the activities provided the hiring manager with information on all four key profile attributes associated with Curious Chameleons.

An ancillary benefit of introducing this exercise is that it has worked its way into the DNA of office culture, so much so that Dartmouth reports that it's considered a "memorable rite of passage" for all members of the team, something that contributes to an *esprit de corps* in the office.

“I want to know whether candidates can listen, think on their feet, be creative, and assimilate information quickly.”

Cornelia Purcell
Senior Managing Director
Dartmouth College

Delaware Tests Ability to Write Compelling Email to Secure Visit

The next exemplar practice comes from the University of Delaware, and is similar to Dartmouth’s role-play exercise as it provides the candidate with information on a prospective donor. But the focus of this tactic is to test a candidate’s ability to craft a compelling email. Gone are the days when people actually answer their phones, and thus email has become an indispensable tool to secure meetings with prospective donors.

Delaware asks its MGO candidates to write an email to a prospect based on the available intelligence. This answers many questions for hiring managers. For example, does the candidate identify the right parts of contact reports and giving history? Does he find the right levers to pull to get a prospect to agree to meet? Writing such an email should be a very straightforward task for someone interested in an MGO role, but the results have been interesting. Beth Brand, the associate vice president of development, shared a story about one candidate who walked out of the interview when asked to do this exercise—a startling indication of his lack of readiness for the role. In addition to the benefit of letting the candidate know what types of activities would be required, this exercise tests a candidate’s writing ability, a critical skill for MGOs.

Exercise Instructions:

Draft a 200–300 word email asking “Dr. Potter” to meet with you and discuss his involvement with the university and his giving.



Prospect Information Provided to Candidate:

- Giving history
- Contact history
- Biographical details
- Additional information from news sources

“In addition to assessing written communication skills, our writing exercise tests whether candidates think quickly and are creative. It also determines whether they can appropriately use information they are given.”


Beth Brand
AVP of University Development
University of Delaware

“Show Me” Selection Model


The next interview technique comes from a public regional university in the western U.S.: Northern Arizona University. NAU has an innovative selection model it uses for its major gift officers.

Their process involves four different activities:

1 First, candidates are asked to plan a trip itinerary. They review a list of prospects in Southern California and plan a two-day trip to visit them. The prospect list is in spreadsheet format, too long to include a visit to everyone, and includes basic information, including past giving, address, wealth rating, and last contact. Candidates must create a detailed itinerary including who they’d visit, when they’d visit them, which plane ticket they’d buy, how much driving time they’d include between visits, and more. This exercise tests a candidate’s ability to prioritize between prospects and choose anchor visits. It also tests basic practicality and the simple ability to plan an itinerary. Trip planning is particularly important at NAU because the campus is based so far from the majority of its donors and trips are a common feature of MGO life. Overall, this activity tests a candidate’s ability to distill and prioritize information.


 Rural schools and those for whom a primary donor base is not close to campus will find this tactic especially relevant.

2 Next, the hiring manager arranges for each finalist candidate to meet with an actual donor (a university volunteer). The candidate receives some information on the donor and signs a confidentiality agreement. The hiring manager accompanies the candidate on the visit to make the introductions but takes a passive role in the meeting. This exercise is an excellent method to test behavioral and linguistic flexibility.

 One potential drawback with this activity is that the volunteer may either become too attached to a candidate who doesn’t ultimately receive an offer, or the reverse situation, where the volunteer dislikes a candidate who ends up being hired.

3 After the donor visit, the manager and candidate return to campus and the candidate completes a contact report for the visit. This is an excellent method for evaluating a candidate's intellectual and social curiosity. The hiring manager looks for whether the candidate picked up on the right cues, asked good questions, and identified appropriate next steps.

4 The last step of the interview is a group activity called a Prospect Strategy Session. Similar to the trip itinerary exercise, this tests the information distillation skill of the individual. The hiring manager, candidate, and at least one peer MGO have a conversation about strategy for a prospect. Ideally, the subject will be a multi-interest prospect affiliated with the hiring unit. NAU has two goals with this exercise: one, to see how appropriately the candidate can identify strategies for the prospect based on background information, and two, to see how the candidate interacts with other staff members.

 This is a great way to find out what someone might be like as a colleague and to secure buy-in from staff members on the hire.

NAU's Selection Model in Brief

Plan a Visit Itinerary

- Measures information distillation skills
- Especially helpful with dispersed prospects

Visit with a Prospective Donor

- Tests linguistic and behavioral flexibility, and intellectual and social curiosity
- Opportunity to engage volunteers/trustees in a non-financial way

Write a Contact Report

- Measures information distillation skill
- Tests candidate's writing skills and measures their ability to glean important facts and identify next steps

Create a Prospect Strategy

- Measures information distillation skill; also determines how the candidate interacts with other staff
- Secures buy-in from other staff members

Online Assessments

In investigating the use of innovative tactics designed to better select MGO candidates, we were surprised by how few institutions have deployed online assessments as a means of learning more about candidates. This practice is common outside of higher education, with companies like Barclays and H&R Block, government agencies like NASA, and NGOs like Oxfam using online assessment tools in their selection process. Indeed, the percentage of applicants taking such an exam has nearly doubled of late, increasing from 18% in 2008 to just over 33% in 2013.

We found two organizations that are doing some excellent work with regard to online assessments: Washburn University and EAB's sister company, CEB.

Washburn Gathers Actionable Intelligence on New Hires

After concluding initial interviews, but before making an offer, the Washburn University Foundation asks MGO candidates to complete an online skill and behavioral test. Washburn has found that this exercise has been a valuable supplement to the other parts of the interview. The test is administered as part of a partnership that the Washburn University Foundation has with a local consultant. The test evaluates individuals on the basis of several thinking skills, competencies, and behaviors, and it allows employers to set an acceptable range for each quality.

Washburn reports that the test is accurate, as the senior leadership team has tried it out and found it to be aligned with their self-perceptions. Additionally, what we found most interesting about this exercise is that Washburn has used the test results to plan onboarding. Washburn can ascertain a new hire’s skill and competency gaps, and then plan her professional development so she can hit the ground running as quickly as possible.

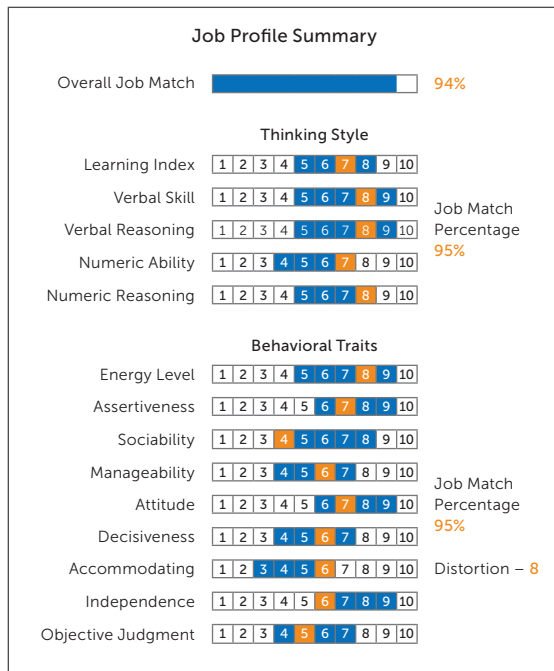
Hiring manager meets with CAO to create ideal profile of individual to be hired



Candidate completes online survey with questions measuring thinking style, behavioral traits, and interests

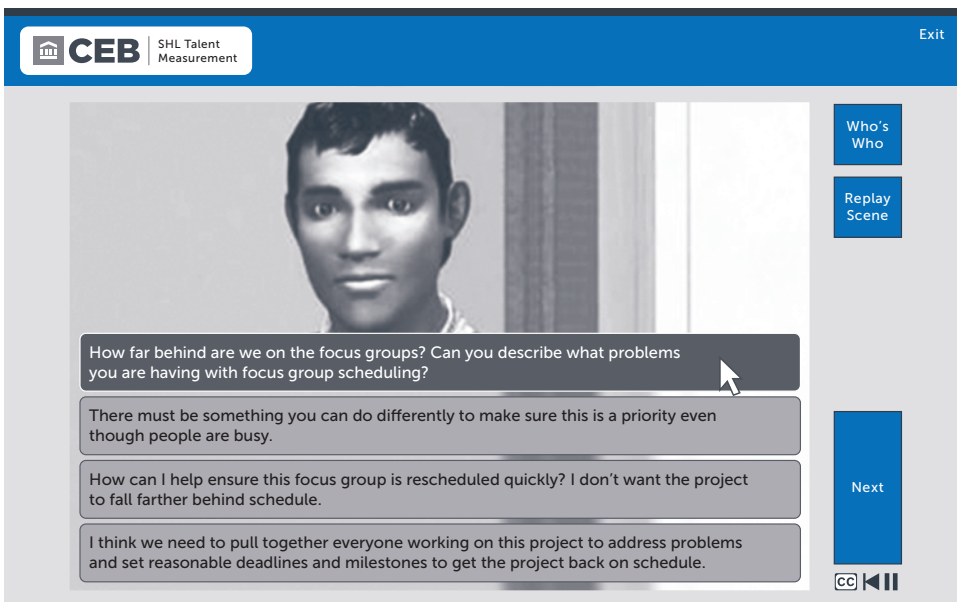


Hiring manager receives candidate report and uses results to assist planning for final interview questions, onboarding, and professional development



CEB: Testing Competence and Cultural Fit

CEB is a sister company to EAB that produces best practice research for a variety of industries in the for-profit sector. The firm's SHL Talent Measurement Solutions division offers a suite of online assessment tools that test a candidate's situational judgment, aptitude, knowledge, and skills, as well as cultural fit. The screenshot below is a representation of one such test. Candidates log in to the system and make a series of decisions based on information they are supplied. It's an excellent way to test a candidate's judgment, content knowledge, and the speed with which she's able to make decisions. Our research did not uncover any fundraising shops customizing this technology to test candidates in relevant settings (e.g., prospect meetings), but we believe it's only a matter of time before higher education institutions begin using such assessments, given the promise they hold for making better hiring decisions.



Learn More

This research briefing is based on a larger initiative on major gift officer human capital strategy. To learn more, please contact your EAB Dedicated Advisor.

› [Inside the Mind of a Curious Chameleon: An Infographic](#)

A deep dive into the attitudes and behaviors associated with the Curious Chameleon.

› [Competing for Talent: 9 Strategies for Reengineering MGO Recruitment](#)

This white paper focuses on best practices in MGO recruitment, including segmenting candidates by level of experience, engaging allies across the university to assist in candidate sourcing, and offering innovative stretch roles for career development. It also includes a toolkit to guide your staff in planning a more robust MGO recruitment strategy.

› [Forthcoming Research](#)

Given the tight market for experienced major gift officers, advancement leaders recognize that identifying and attracting top performers is only part of the talent management challenge. The complex demands and revenue implications of today's major gifts necessitate a strong focus on retaining and developing high-performing gift officers. EAB's 2015 research will provide our members with proven strategies for MGO retention, including breakthrough practices for onboarding, ongoing professional development, and next-level roles for senior fundraisers. It will also uncover the most relevant metrics against which MGOs should be assessed and provide guidance for how these metrics can be deployed to inflect performance levels.

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