Star File Excel Spreadsheet

Instructions

We recommend creating a database to store contact information and other relevant information on prospective candidates. The table below serves as a template for this database. Copy the table into the database manager of your choice. Microsoft Excel, Google Drive, and FileFinder are most common, but a variety of programs will work.

Name	Phone	Email	Employer	Title	Referral Source	Alum Status	Best Fit Unit	Link to Resume	Contact History	Notes

Building the database is just one part of a comprehensive star file. See Strategy #1: Systematize Vacancy Planning from our Competing for Talent study for suggestions about generating candidate leads, cultivating relationships, and ensuring regular updates.

Source: EAB interviews and analysis.

Departure Risk Appraisal

Instructions

Many advancement units may be at risk of employee departures due to a competitive talent crunch and increased demand. While most institutions currently choose to address departures as they occur, multiple MGO departures could quickly lead to staffing gaps and increased time to fill. By proactively identifying the areas where departures are most likely, divisional leaders can target retention efforts and adjust staffing needs to prevent these problems from occurring.

Step One: Assess Employees’ Retention Risk

Managers overseeing teams or departments identified in the first step assess individual retention risk of each employee.

Step Two: Pinpoint Employees with Highest Risk Score

Administrators can use overall employee retention risk scores to identify individual MGOs most at risk of leaving your institution.

Step Three: Prioritize Near-Departure Staff by Criticality

Administrators or strategic talent management staff can equip managers of the most at-risk departments with tools to identify which individual employees are both critical to the department and at risk of departure in the near term. The goal is to craft individualized retention plans for the most critical at-risk employees to encourage their continued service.

Practice Assessment

This practice provides leaders with a direct method to identify areas of their organization with the greatest retention risks, a vital step to prevent damaging staffing gaps and poor donor relationships. Deploying the appraisal requires only a small to moderate time investment from department leaders and hiring managers.

Source: HR Investment Center interviews and analysis; Philanthropy Leadership Council interviews and analysis; EAB interviews and analysis.

Employee Retention Risk Assessment

Instructions

Managers should complete this assessment for every employee in their department or unit annually. For each employee, they should consider how much they agree with each statement, ranging from disagree to strongly agree. Once managers have tallied up the columns, they should select the employee's overall departure risk. In the event of a tie, they should make a judgment call on overall departure risk.

Employee Name: ________________________________ Age: ________

Manager Name: _________________________________ Department: _______________________________

Background	Disagree	Somewhat Agree	Strongly Agree
The employee has openly discussed plans to transition from our institution within the next 12 months.			
The employee has been at the institution for at least eight months or has indicated s/he has been contacted by a recruiter.			
Relationships			
The employee does not communicate openly with his/her direct supervisor.			
The employee has a poor working relationship with his/her direct supervisor.			
The employee does not have many friends within the institution.			
Employment Proposition			
The employee expresses frustration with compensation.			
The employee expresses frustration with office culture.			
The employee has not had the opportunity for professional growth in the last 12 months.			
The employee has not recently received recognition for his/her contributions.			
Behavior			
The employee often does not meet goals.			
The employee seems overwhelmed with current job duties.			
The employee's engagement level has noticeably dropped.			

	Disagree	Somewhat Agree	Strongly Agree
Total			
Overall Departure Risk (Circle One)	**Low**	**Medium**	**High**

Source: HR Investment Center interviews and analysis; Philanthropy Leadership Council interviews and analysis; EAB interviews and analysis.

Departure Impact Scoring Guide

Note on Use

This tool helps managers identify employees whose departure will have the largest impact on the department. Managers should assess each employee using the five categories and corresponding criteria described below. The categories are not necessarily of equal weight—managers should assess “Overall Impact” using the number of “Low,” “Medium,” and “High” responses as well as their own instinct about the employee.

Employee Name: ________________________________ Age: ________

Manager Name: _________________________________ Department: ________________________________

Category	Low	Medium	High
Performance	Overall rating on evaluation failed to meet expectations	Meets expectations	Consistently exceeds expectations
Unique Skills or Knowledge	No particular unique skills or knowledge	Has special skill or knowledge shared by only a few	Possesses unique and valuable knowledge or skills not found in others
Replacement Difficulty	Expected replacement time is 30 days or less	Expected replacement time is 31 to 90 days	Expected replacement time is greater than 90 days
Leadership	No interest in things that do not have a personal impact	Works well with others, contributes to greater department good	Informal leader, team player, and role model
Social Influence	Few or no friends at work, departure unlikely to have impact	Well liked, departure would have limited ripple effect	Extremely well liked, departure would impact morale

Overall Impact (Circle One)	**Low**	**Medium**	**High**

Source: HR Investment Center interviews and analysis; Philanthropy Leadership Council interviews and analysis; EAB interviews and analysis.

Risk and Impact Worksheet

Instructions

This tool allows managers to capture both the departure risk score calculated in the "Employee Retention Risk Assessment" and the departure impact score calculated in the "Departure Impact Scoring Guide" for each employee. Managers should fill out the worksheet below and record both scores, identifying employees with higher departure risk and whose departure will most impact the department or unit.

Manager Name: ______________________________ Department: ______________________________

Employee Name	Retention Risk			Departure Impact		
	Low	Medium	High	Low	Medium	High

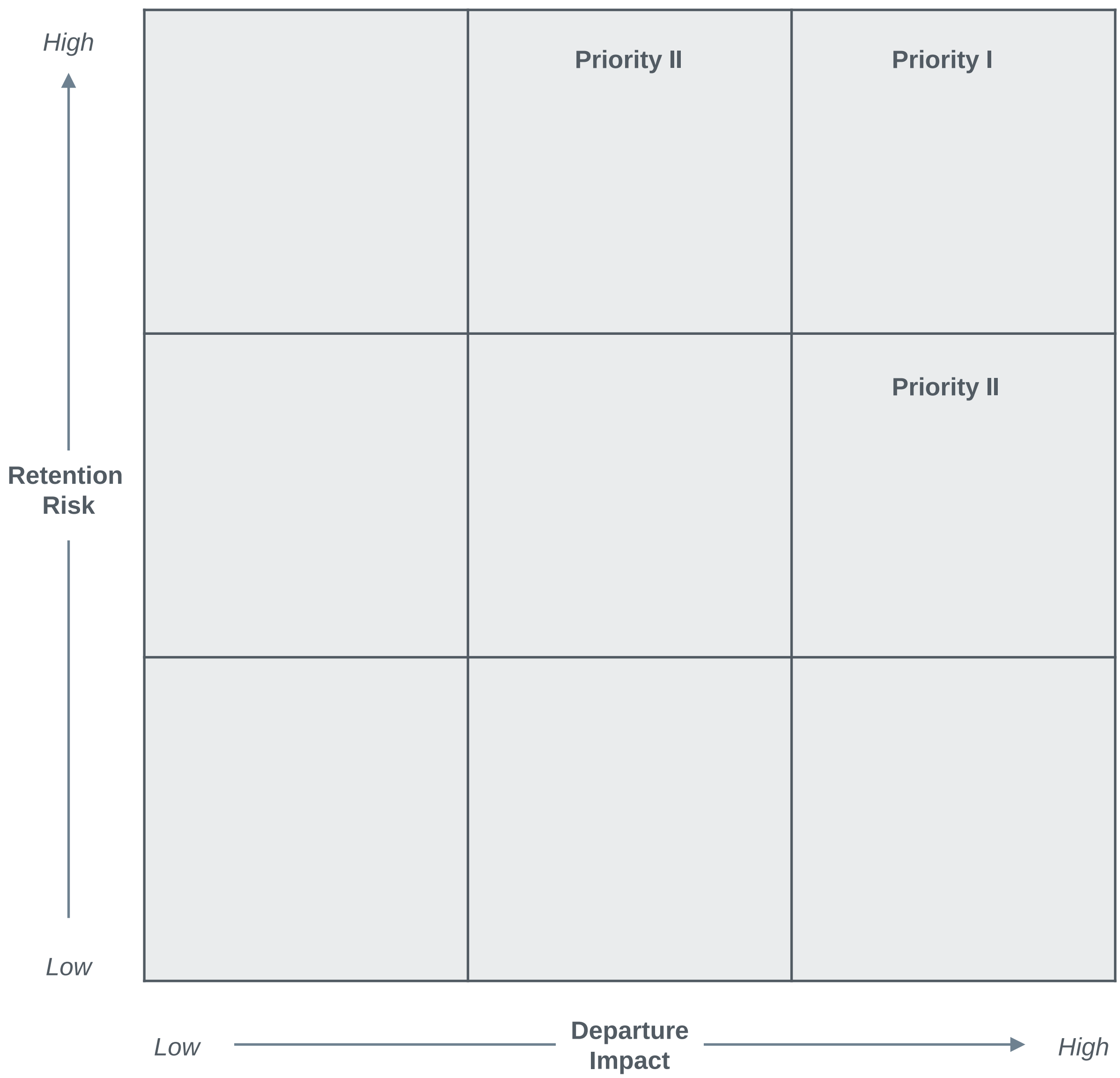
Source: HR Investment Center interviews and analysis; Philanthropy Leadership Council interviews and analysis; EAB interviews and analysis.

Employee Prioritization Matrix

Note on Use

This matrix enables managers and administrators to identify employees most worthy of targeted retention efforts. Using the results from the “Risk and Impact Worksheet,” managers or administrators should plot employees on the matrix. Individual retention plans should be created for those high-impact, high-risk employees falling in the upper right.

Manager Name: ______________________________ Department: ______________________________



Source: HR Investment Center interviews and analysis; Philanthropy Leadership Council interviews and analysis; EAB interviews and analysis.

Social Media Referral Campaign Strategy Guide

Instructions

This resource outlines **six steps** to establish a social media referral campaign. These campaigns surface top talent in your employee networks and help fill staff vacancies. While often centered around a specific skill, competency, or position (e.g., MGO), the practices outlined below can be applied to many subunits within your division.

Step One: Platforms and Networks

Correspond with your hiring team to identify what social media platforms will gain the most traction at your organization. While some campaigns span multiple platforms, others concentrate their efforts on a single platform. Options to consider include:

- LinkedIn
- Facebook
- Twitter

In order to execute on the campaign it will be important for your division to maintain and brand a specific handle or page for your hiring needs. Examples could include @InstitutionAJobs (twitter) or a group titled “Advancement Jobs at Institution B,” (LinkedIn). Some institutions may require you to go through central HR or marketing and communications to ensure you meet all internal social media branding requirements.

Source: EAB interviews and analysis.

Social Media Referral Campaign Strategy Guide (cont.)

Step Two: Participants

The next step in launching a successful campaign is to identify which staff you want to engage in conducting outreach. Key questions to consider:

Common Goals	*Referral Audience*
☐ I want the greatest number of applicants possible	Open the referral campaign to **all advancement staff**
☐ I want to capture strong candidates that already have some institutional knowledge	Open the referral campaign to **all office alumni (former employees)**
☐ I want to focus on high-quality candidates with fundraising experience	Open the referral campaign to **all current MGOs**

Step Three: Incentives

To incentivize employee participation in the referral campaign, you and your team should consider offering participating employee incentive awards. Awards could be given for the entire unit or just to an individual. They might include “soft incentives” (e.g., jeans casual days or additional time off), a monetary reward, or commercial goods (e.g., an iPad).

Potential Incentive Offerings

- Electronic goods
- Gift cards
- Jeans casual
- Extra time off
- Cash bonus
- Alumni travel trip

Source: EAB interviews and analysis.

Social Media Referral Campaign Strategy Guide (cont.)

Step Four: Staffing

It is important to identify a staff member in the advancement division to serve as the campaign coordinator to ensure a successful social media referral campaign. We suggest a staff member in strategic talent management, a hiring manager, or a volunteer. The individual should be well versed in University HR policies, detailed-oriented, and able to manage high email volume. Of course, social media experience is also highly desirable.

Potential Manager Name	Relevant Skills

Step Five: Branding and Communication

The staff member who has been identified in step four is responsible for marketing the program to the referral campaign audience in a way that encourages participation. The campaign coordinator should send an email to inform employees of the campaign and list appropriate resources. An example email template is included below.

Dear Employee,

It is with great enthusiasm that the VP for Advancement announces the launch of INSTITUTION's first-ever employee referral campaign. As you know, we are about to launch a new campaign and need to staff up. To do that, we need your help. Please reach out to people in your network with **fundraising**, **communications**, **and leadership skills**, and invite them to consider applying for a position at INSTITUTION.

To promote all relevant jobs we suggest that you use the hashtag ***#institutionjobs*** on Twitter or post the following link (www.advancementjobs.institution.edu) on relevant LinkedIn pages to encourage people in your networks to send their résumé.

Referred individuals will be asked to provide the name of the person they know in the office. The staff member who passes the most leads will receive a free trip through our alumni travel program. Additionally, the team that refers the most candidates will receive half-day Fridays across the months of July and August.

We will update you in two weeks to announce the leading units and individuals!

If you have any questions, please do not hesitate to contact us at referrals@institution.edu

Sincerely,

AVP of Development or Strategic Talent Management Staff

Source: EAB interviews and analysis.

Social Media Referral Campaign Strategy Guide (cont.)

Step Five: Branding and Communication (*cont.)*

Referrals that are submitted during the campaign need to be stewarded effectively. Your HR staff or hiring manager must connect with both the candidate and the referrer within 24 hours of receiving the résumé to inform them that you have received the materials and will review them shortly. These first few hours are a make-or-break moment for the candidacy.

This outreach should also calibrate their expectations and inform them of how long the process will take.

Candidate Referral Email

Dear Candidate,

Thank you so much for applying for a job in University Advancement. It's a testament to your work that [NAME OF REFERRER] supported your application. We look forward to reviewing it.

We will make every effort to review your materials in the next two weeks and be in touch with you to discuss further opportunities at that time.

Please do not hesitate to reach out if you need to connect with us.

Thanks!

The HR Team

P.S. Take a look at website to understand more about our office culture and benefits!

Employee Referrer Email

Dear Employee,

Just a quick note to let you know that [NAME OF CANDIDATE] has submitted his/her résumé though the referrals campaign. **S/He heard of the job through your tweet using our hashtag #UniversityAJobs—way to go!**

We will evaluate the résumé against our hiring needs and communicate a decision to you and the candidate in the coming weeks—but rest assured the referral will count towards both the individual and team goals.

Please do not hesitate to reach out if you need to connect with us.

Thanks!

The HR Team

Step Six: Analytics

A social media referral campaign is only as strong as the candidates it surfaces. In order to evaluate and improve future hiring campaigns, track the following fields for each hiring campaign, for example, in a spreadsheet like the one below:

Campaign Date or Name	Percentage Participation (Employees)	Percentage Participation (Units)	Number of Candidates (LinkedIn)	Number of Candidates (Twitter)	Percentage of Referrals Hired	Average Tenure of Referrals

Source: EAB interviews and analysis.

LinkedIn Candidate Sourcing Guide

Instructions

Leverage the features of a premium LinkedIn account to source candidates and cultivate relationships with them. For maximum impact, combine this strategy with a Star File.

Step 1: Obtain Access to a Premium Account

You may not need to purchase a new account—many prospect research offices already have them. Check with your prospect research team to see if they have an account they could share with your recruiter.

Design a profile for one of your recruiting staff or your office broadly which communicates your institutional identity.

See the chart below for a comparison of costs and services:

LinkedIn	Standard LinkedIn	Talent Basic	Recruiter Lite	Recruiter Corporate
Annual Cost	Free	$576	$1,200	$8,640
Who's Viewed Your Profile	Limited	✓	✓	✓
Full Network Visibility			✓	✓
In Mail messages per Month	0	10	25	50
Premium Search Features		✓	✓	✓
Mobile Access			✓	✓
Pipeline Access			✓	✓
Team Collaboration				✓

Step 2: Conduct a Search

Consider searching for the following criteria and saving useful searches for future reference:

- Current title – *Major gift officer, annual giving officer, fundraiser*
- Current tenure – *over six months, over two years*
- Current employer – *peer institutions, regional nonprofits*
- Keywords – *engineering, business, science, performing arts*
- Alma Mater – *alumni of your institution or a sister institution*

Source: Linkedin.com; EAB interviews and analysis.

LinkedIn Candidate Sourcing Guide (cont.)

Step 3: Connect with Prospective Candidates

Choose one of the following strategies for reaching out to prospective candidates:

Indirect

Reach out to prospective candidates with the stated intent of building your network

Direct

Take a more active approach by raising the prospect of an open position in outreach

Exploratory

Review second- and third-degree connections and ask for introductions to promising candidates

Step 4: Stay in Touch

Consider the following tactics for cultivating a relationship with your prospective candidates:

Milestone announcements

Campaign updates

Congratulations for a work achievement

Regular office newsletters

Step 5: Assess and Revise Strategy

Leverage LinkedIn's assessment and project management tools, which include folders for sorting saved candidate profiles and reminders when it's time to reach out again. In addition, reflect on the following questions and revise your outreach strategy accordingly:

Which outreach strategies were the most effective and why?

Which outreach strategies were the least effective and why?

How would you change your approach in the future?

Source: EAB interviews and analysis.

Remote Major Gift Officer Hiring Worksheet

Instructions

Hiring a remote major gift officer comes with some special considerations, such as what competencies are necessary for success in the role and where to base the MGOs. Institutions interested in creating remote major gift officer positions can use the following worksheet to ensure that they avoid common pitfalls.

Step 1: Make Smart Hires

What competencies do you think will be necessary for someone to succeed in this remote position?

Competency 1: ______________________________________

Competency 2: ______________________________________

Competency 3: ______________________________________

List some questions or activities you could incorporate into your interview process to test for those competencies:

Competency 1: ______________________________________

Questions: ____

____

____

Competency 2: ______________________________________

Questions: ____

____

____

Competency 3: ______________________________________

Questions: ____

____

____

Source: EAB interviews and analysis.

Remote Major Gift Officer Hiring Worksheet (cont.)

Step 2: Place Remote MGOs Strategically

Use the following tools to help identify regions where you should focus your remote MGO recruiting efforts.

In what regions do you currently have a highly concentrated or particularly active donor base?

Where would like to expand your donor recruitment or stewardship efforts?

What urban centers are within a reasonable driving distance?

Source: EAB interviews and analysis.

Remote Major Gift Officer Hiring Worksheet (cont.)

Step 3: Build a Strong Team

Incorporate extra teambuilding and acculturation activities into your onboarding program for remote MGOs. Here's a sample from Missouri S&T, with the relevant sessions in bold:

Missouri University of Science and Technology **Joe Miner Itinerary** February 4-8, 2013	
8:30am	Group HR Orientation for all new hires
9:30am	Introduction to Prospect Research team
10:30am	Meet with Chairman of hiring department
12:30pm	**Lunch with Development Team**
2:30pm	Tour of Career Opportunities & Employer Relations
4:30pm	**Tour of the Solar Village**
8:30pm	**University Basketball Game**

What teambuilding and acculturation activities could you incorporate into your orientation?

What activities could you conduct on a recurring basis when remote MGOs return to campus?

Step 4: Communicate Intentionally

Develop a strategy for checking in with your remote MGO to ensure that projects are proceeding on time and key communications were received.

Project	Final Due Date	Checkpoint 1 Date	Checkpoint 1 Tasks	Checkpoint 1 Status

Source: EAB interviews and analysis.

Reference Check Question Bank

Instructions

This resource can be used to get the most value from candidate reference checks. It lists questions that help hiring managers make more strategic hires and surface valuable, useful, and actionable information from reference checks.

Remember to give candidates advanced notice that you will be checking their references. It is important to be consistent across all candidates. Ensuring that you ask all references for all finalists the same questions is key in this process.

It is also important to mention the position the candidate is being considered for and what the responsibilities will be to the individual you are calling . A brief outline or description from the vacancy posting or job description should suffice.

Sample Reference Check Question Document

Position: _____________________ Department: __________ Hiring Manager: ______________ Date of Interview: __________

Candidate Name: __________________ Interviewee Name: ___________________Relationship to Candidate_______________

Previous Work Experience Questions

- How would you compare him/her with others in your department who were performing the same job?
- How would you describe the applicant's interpersonal and written communication skills?
- How would you describe the candidate's institutional and personnel leadership skills?
- Please describe the candidate's political acumen and ability to work with senior leadership.
- Describe how the candidate reacted in stressful situations. Be specific.
- Additionally, how does s/he handle difficult people? What is his/her conflict resolution protocol?
- What are the candidate's key accomplishments or impact on the organization?

Development Opportunity Questions

- What area could this individual continue to grow in?
- What does this candidate need to do his or her best work?
- How independently does the candidate work? How often does the candidate check in with stakeholders and supervisors?
- Does the candidate always conduct his/her dealings with others in a tactful manner?
- What area of development could the candidate focus on?
- If you were going to provide advice on how to best guide this person, what would it be?
- Where would you invest your first professional development dollar on this candidate?

Source: EAB interviews and analysis.

Candidate Prewire Email Template

Instructions

The email below serves as a template which you can use to inform MGO candidate interviewees about their time on campus. We recommend you send the email at least 2 days prior to the candidates arrival on campus.

Dear Candidate,

We look forward to welcoming you to campus next week. Please review and make yourself familiar with the following schedule. If you have any questions, please let me know. Once again, we are looking forward to welcoming you on campus at [INSERT BUILDING NAME] on [DATES OF INTERVIEWS].

Day One

- *Flight reservation information: airports, departure and arrival time, reservation number*
- *Car rental Information or Airport Pickup Details*
- *Hotel check-in information including check-in time, reservation number, and hotel address*
- *Dinner reservation information including restaurant name and the name and titles of other attendees*

Day Two

- *Time, location, names and titles of interviewees*
- *Lunch reservation information with attendee information*
- *Campus departure information including time and car rental return information*
- *Departure flight information including airport codes, departure and arrival times, and reservation numbers.*

We hope you enjoy your time on campus. Of course, please do not hesitate to contact our office if we can be of any help at 202-555-4545 or at development@ABC.edu

Kind regards,

AVP for Development, University A

To add a personal touch, include links for:

- Local restaurants
- Points of interest
- Area shopping
- Chamber of Commerce

Source: EAB interviews and analysis.

Staff Prewire Email Template

Instructions

Use the email below as a template for debriefing interviewers before each candidate arrives on campus. We recommend that you send this email at least one day prior to the interview.

Hazel University Foundation
Interview Preparation Email

Candidate: Erica A. Brown

Interview Date: 8 August 2014

Interview Schedule

Time	Event	Staff Attendees

Suggested Focus Areas for Questions

- *Management experience*
- *Ability to succeed in a team environment*
- *Interest in higher education*

Question Suggestions

- *Can you tell us about a time that you needed to deliver negative feedback to someone you managed? What was your strategy for doing that?*
- *What goal are you most proud of accomplishing through team effort?*
- *What do you think is the most urgent challenge facing universities today and why?*

Attach PDF versions of the candidate's resume and a standardized feedback form to the email.

Source: EAB interviews and analysis.

Candidate Competency Worksheet

Instructions

Managers should refer to the candidate competency worksheet below designed by **Massachusetts Institute of Technology's** Resource Development team to identify the key competencies required for each position when a vacancy occurs. The hiring manager should identify the top five competencies required for the position and rank them in the second and fourth columns below. This will help ensure the recruiting team is able to screen résumés more effectively, not only for top talent, but also for talent that meets the specific needs of the unit's vacancy.

Competency	Rank	Competency *(continued)*	Rank
Adaptability/ Flexibility		Intelligence	
Analytical Skills		Motivation	
Attention to Detail		Partnering	
Business Acumen/ Strategic Business Perspective		Personal/Professional Effectiveness	
Change Management		Planning and Organizing	
Communication/ Influence		Process Management/ Quality	
Conflict Management		Risk Taking	
Continuous Learning		Strategic Visioning	
Cultural Sensitivity		Stress Management	
Decisiveness/ Judgment		Teamwork	
Influence		Technical/ Professional Expertise	
Initiative		Tenacity	

1) MIT Resource Development utilizes competencies developed by Lominger International: A Korn/Ferry Company www.lominger.com

Source: Massachusetts Institute of Technology Resource Development; EAB interviews and analysis.

Interview Evaluation Matrix Competency Assignments

Instructions

Managers should use the evaluation matrix designed by **Massachusetts Institute of Technology's** Resource Development team to ensure all interviews are high value. Individuals coordinating the interviews should identify specific interviewers to assess the candidate's performance in one or more specific competencies. Staff who conduct interviews should have access to this matrix in advance of the interview to understand who will focus on what competency to better use the limited interview time.

EAB recommends pairing this practice with the competency question bank on the next page to help staff conducting interviews maximize the return of the interview and minimize preparation time.

	Competency ______	Competency ______	Competency ______	Competency ______	Competency ______
Example: **Staff Member Name**	✓			✓	✓
Assigned Person					
Assigned Person					
Assigned Person					
Assigned Person					
Assigned Person					
Assigned Person					

1) MIT Resource Development utilizes competencies developed by Lominger International: A Korn/Ferry Company www.lominger.com

Source: Massachusetts Institute of Technology Resource Development; EAB interviews and analysis.

Competency Question Bank

Instructions

Hiring managers and recruiters should provide the competency question bank below, designed by **Massachusetts Institute of Technology's** Resource Development team, to help individuals conducting interviews maximize the utility of the interview and minimize preparation time. Staff members conducting the interview should receive their assigned competency to assess and the question bank at least 48 hours prior to the interview.

Competency	Definition	Sample Questions
Accountability	Holds self and others accountable for results; conveys a sense of urgency and drives issues to closure; follows through on and meets commitments; persists despite obstacles and opposition.	▪ Describe a time when you demonstrated dependability under difficult circumstances. ▪ Give me an example of a time when you demonstrated a sense of urgency about getting results done. ▪ Tell me about a project you worked on or led that required you to persist in overcoming a series of obstacles. ▪ How have you gotten around obstacles that prevented you from meeting deadlines?
Adaptability/Flexibility	Adjusts to new, different, or changing requirements; remains open to alternative approaches; maintains composure under pressure; performs a wide variety of tasks and changes focus quickly as demands change; manages transactions effectively.	▪ Tell me about a success you had because of your open-mindedness. ▪ Tell me about an instance in which you changed an opinion or action plan after receiving new information. ▪ Describe a time when you were faced with problems or stresses at work that tested your coping skills. What did you do? ▪ Tell me about a situation in which you spent a lot of time working with a group on a project only to find out that the group disagreed with your ideas. How did you deal with this?
Attention to Detail	Remains alert in a high-risk environment; follows detailed procedures and ensures accuracy in documentation and data; carefully monitors process and organizes systems of records.	▪ When have you found it necessary to use detailed instructions/procedures to increase accuracy? Be specific. ▪ How have you gone about ensuring accuracy and consistency in a document or project on which you were working? ▪ Tell me about a specific time when your attention to detail made a difference. ▪ Give me an example that demonstrates your ability to organize and maintain a system of records.

1) MIT Resource Development utilizes competencies developed by Lominger International: A Korn/Ferry Company www.lominger.com

Source: Massachusetts Institute of Technology Resource Development; EAB interviews and analysis.

Competency Question Bank (cont.)

Competency	Definition	Sample Questions
Business Acumen/Strategic Business Perspective	Has a broadly based understanding of key business fundamentals; understands the drivers of the financial health and viability of the organization, and takes responsibility for maintaining its ongoing fiscal soundness.	▪ Describe how your current role impacts the organization (current one) in a positive way. ▪ Describe how you currently see your responsibility in helping your colleagues in other departments meet their goals. What have you actually done to help them? ▪ What are some major institute issues that currently affect you? ▪ What drivers or key indicators do you use to focus your work and priorities?
Communication and Influence	Effectively transfers thoughts and expresses ideas using speech, listening skills, and writing skills to influence others or gain their support; listens with objectivity and checks for understanding.	▪ Describe a challenging time when others relied on you to interpret information or a message for them. ▪ Tell me about a time when you had to communicate difficult or unwanted information to a client. How did you handle it and what were the results of your interaction? ▪ Give me an example of when you made a presentation to an uninterested or hostile audience. Walk me through how you made it work. ▪ Describe a challenge you had in persuading a colleague, subordinate, or group on a course of action. ▪ Tell me about a writing assignment or project of which you are most proud.
Continuous Learning	Stays informed of current industry trends; learns and applies new concepts and demonstrates career self-reliance; identifies own areas of opportunity and sets and monitors self-development goals; looks for and takes advantage of new learning opportunities.	▪ Tell me about a time when you offered suggestions about improving a long-standing process that had a large impact on productivity. ▪ Describe the criteria or methodology you use to determine when it's time to make a change to a process. ▪ What process or quality improvement are you most proud of in your current role? ▪ Describe an effort you undertook to proactively identify your own weaknesses and areas of opportunity. ▪ What do you do to stay informed of emerging industry trends and practices? Think of a time when you were able to use this information to add value to a project.
Cultural Sensitivity	Values diversity; creates an inclusive environment; sensitive to other cultures; aware of personal impact on others.	▪ Describe a series of interactions you had in which you adapted your behavior around other peoples' styles. ▪ Describe an effort you undertook to ensure that diversity was accepted and facilitated in your work area. What were the results? ▪ Provide an example that shows your competency and ability in interacting with people who have different values than you. ▪ Describe a time when you had to adapt to a person from a background or culture that was different from yours. What did you do and how did you feel about it?

1) MIT Resource Development utilizes competencies developed by Lominger International: A Korn/Ferry Company www.lominger.com

Source: Massachusetts Institute of Technology Resource Development; EAB interviews and analysis.

Competency Question Bank (cont.)

Competency	Definition	Sample Questions
Decisiveness/Judgment	Demonstrates logic, rationality, and objectivity in decision-making; isolates and defines issues; analyzes alternate solutions and potential outcomes; anticipates consequences of decisions; takes appropriate, quick action in a high-risk crisis; follows through on difficult decisions; recognizes when it's appropriate to include others in the process.	▪ Tell me about a business decision that adversely impacted you/your team and what you learned from it. ▪ Give me an example of how you reached a practical business decision by an organized review of the facts and weighing of options. ▪ Describe a time when you had to make a decision when you really would have preferred more information. ▪ What process or criteria have you used to determine when it's appropriate to bring others into the decision-making process?
Initiative	Seeks out and seizes opportunities; provides great results from ordinary circumstances; prepares for problems or opportunities in advance; undertakes additional responsibilities; transforms ideas or leads into productive business outcomes.	▪ Describe a time when you voluntarily undertook a special project above and beyond your normal responsibilities. ▪ Describe a time when you went to great lengths to express an unpopular idea. ▪ Tell me about a time when you did more than was expected in your role. What caused you to take action? What were the results? ▪ What change(s) have you tried to implement in your area of responsibility?
Intelligence	Acquires understanding and absorbs new information rapidly; "quick study."	▪ What has been the most difficult skill or task you had to learn in your current role? How did you master it? ▪ Describe a time when you learned something complex in a relatively short period of time. ▪ Given the changing and high-paced nature of the business environment, how do you keep up with new information in your field?
Motivation	Strives to improve or meet a standard of excellence; aligns with the goals of the group or organization; readiness to act on opportunities; persistent in pursuing goals despite obstacles and setbacks.	▪ All jobs have their frustrations and problems. When have you felt this in your work and how have you dealt with it? ▪ Describe for me your biggest frustration when priorities change. What have you done to address your concerns? ▪ Describe a time when you demonstrated dependability in trying circumstances. ▪ Tell me about a project you worked on that required you to persist in overcoming a series of obstacles to achieve project success.

1) MIT Resource Development utilizes competencies developed by Lominger International: A Korn/Ferry Company www.lominger.com

Source: Massachusetts Institute of Technology Resource Development; EAB interviews and analysis.

Competency Question Bank (cont.)

Competency	Definition	Sample Questions
Partnering	Identifies opportunities for synergy across functions; uses informal and formal networks to accomplish task; works to achieve the common goal; promotes cohesiveness.	▪ Think of a project or business initiative that you recognized would impact others. What did you do to include others in the process? ▪ Tell me about an experience where others outside your group asked for your help in solving a problem or meeting a deadline. How were you able to help? ▪ Describe a time when you were praised individually for something to which others contributed. What did you do? ▪ Departmental boundaries in organizations occasionally present obstacles in gaining cooperation and working with others. What have you done to remedy those situations/challenges?
Personal/Professional Effectiveness	Demonstrates ability to be self-directed and self-motivated; walks the talk; attempts to make actions reflect intentions; encourages feedback from others and uses self-assessment to improve; seeks out new experiences and opportunities.	▪ Tell me about a time when you disappointed yourself with regard to your performance. What did you do about it? ▪ Who have you had a difficult time receiving feedback from and why? ▪ Describe an effort you undertook to proactively learn more about your strengths and development needs. How did you use that information?
Planning and Organizing	Establishes a specific course of action for self and/or others to assure accomplishment of an objective, determining priorities and allocating time and resources effectively; optimizes use of time and resources to achieve desired results; meets established project deliverables/deadlines.	▪ Describe a situation where you had to manage multiple projects at one time. How did you determine priorities and handle this? ▪ Think of a project in which you skillfully coordinated people, tasks, and schedules. What did you do? ▪ Tell me what kinds of tools you have used in planning and organizing your time and that of others. ▪ What criteria or process have you used to allocate people, financial, or other resources to projects or getting work done?
Risk Taking	Shows evidence of calculated risk with favorable outcomes; does not "bet the farm."	▪ Describe a recent decision you made that carried more than the usual element of risk. What factors did you consider in making it? ▪ What have you done to encourage others to take risks? Tell me about a time when the results were less than hoped for. What did you learn from this situation? ▪ Describe the riskiest decision you've had to make. What process did you use to gather information? ▪ When have you taken action, knowing that the odds of success were against you? What was your rationale for taking the action? What might you do differently if doing over?

1) MIT Resource Development utilizes competencies developed by Lominger International: A Korn/Ferry Company www.lominger.com

Source: Massachusetts Institute of Technology Resource Development; EAB interviews and analysis.

Competency Question Bank (cont.)

Competency	Definition	Sample Questions
Stress Management	Maintains stable performance under heavy pressure; multitasks various serious impact issues at once.	• What conditions in your work have been the most stressful for you? What have you done about them? • We all have times when we reach our limit. Describe a time when this happened to you. • Describe a time when you faced unreasonable goals or expectations. How did you feel? What did you do about it? • What process do you use to successfully balance multiple tasks when all are a priority?
Teamwork	Works cooperatively with others to achieve results; values other's input and expertise; acknowledges other team members' concerns and contributions; solicits ideas and opinions of other team members; supports team decisions.	• Describe a time when you did something to show team spirit and it had significant influence on the results. • Tell me about a situation when you provided full support for a team decision, even though you didn't agree with it. • Describe a time when you were praised individually for something to which a whole team contributed. What did you do? • Tell me about a time when teamwork was wrong or inappropriate. • Tell me about a time when you believed you knew how to resolve a problem, yet chose to solicit opinions from others.
Tenacity	Passionately strives to achieve results; conveys strong need to win; reputation for not giving up, being persistent.	• Sometimes it is difficult to know when to quit. Describe an experience in which you were too persistent or not persistent enough. What happened? • Give me an example of when you tried your hardest but still failed. What would you do differently today? • Describe a situation in which you stayed with a plan of action until it was achieved, long after others gave up. Why? What did you learn from it?

1) MIT Resource Development utilizes competencies developed by Lominger International: A Korn/Ferry Company www.lominger.com

Source: Massachusetts Institute of Technology Resource Development; EAB interviews and analysis.

Candidate Concierge Launch Guide

Instructions

We recommend designating a candidate concierge—one person in your office who will be the primary point of contact for candidates visiting campus. This person should guide each candidate through his or her interview process while highlighting selling points of the institution and the position along the way.

Step 1: Select a Candidate Concierge

The time required will be a few hours weekly during a hiring phase (specifically for three to four weeks prior to an on-campus interview). The responsibilities could even be shared across multiple individuals, so long as each candidate is assigned to the same individual throughout their interview process. This role could be filled by anyone with some knowledge of campus and the community and an interest in the position. Possibilities could include anyone within the office looking for a leadership opportunity, an administrative assistant, a chief of staff, or even a graduate student intern.

Name of candidate concierge: ____

The remainder of this form can be given to the candidate concierge.

Step 2: Identify Candidate Contact Points

Make a list of all interactions that your institution has with a candidate over the course of their interview process, from the time they submit their application to the time they are hired (or disqualified). Each of these contact points represent an opportunity for the candidate concierge to interact with the candidate, learn about the candidate's interests and needs, and excite the candidate's interest in working at the institution.

In the table below, list each candidate contact point. Identify those which the candidate concierge should do and the action required to transfer this to the concierge.

Interaction	Current Person Responsible	Should Candidate Concierge Take Over?	Action Step Required to Transfer to Concierge

Source: EAB interviews and analysis.

Candidate Concierge Launch Guide (cont.)

Step 3: Learn the Selling Points of the Local Community

The candidate concierge should be prepared to connect candidate interests to specific highlights of your city, region, or school. Possibilities for building this base of knowledge include:

- Visit a representative of the local Chamber of Commerce
- Brainstorm what you love about living there
- Ask your colleagues and friends about their favorite things about living there
- Visit your institution's marketing team or student recruitment team to learn about selling points they use

Step 4: Create a Go-To List of Selling Points and Activities Organized By Interest

Build a quick reference list of selling points and activities that you can refer to when interacting with candidates. You can use the table below or build your own in Microsoft Word, Microsoft Excel, Evernote, or even a hard copy file. We recommend sorting by interest so that you can quickly look up relevant sites. We've populated the table below with some examples.

Interest	Activities
Sports	Minor league sports stadium Community sports team
Arts	Student theatre Community arts center
Has small children	Highly ranked school system Museum of natural history

Source: EAB interviews and analysis.

Candidate Concierge Launch Guide (cont.)

Step 5: Interact with Candidates

For each candidate we recommend taking the following steps:

- Look up their interests on social media
- Incorporate questions about their interests and lifestyle needs into phone screenings
- Create an itinerary for the on campus interview that incorporates time for a campus and community tour and leisure or athletic activities that the candidate enjoys
- Incorporate relevant community highlights into your community tour

Source: EAB interviews and analysis.

Retention Initiatives Website Audit

Instructions

Office culture and opportunities for professional development are two of the primary factors MGOs take into account when selecting a new employer. When potential candidates scan your website, can they see the work your office has done in these areas? Use this chart to assess whether your website informs candidates about your retention efforts. Share the chart with your website designer to plan changes that will benefit your overall recruitment strategy.

Training Sessions	**Listed on Website?**	**Add to Website?**
Guest Speakers	**Listed on Website?**	**Add to Website?**
Consultant Contracts *(especially to improve retention or professional development)*	**Listed on Website?**	**Add to Website?**
Other Retention Efforts *(new metrics system, office culture shift, teambuilding retreat, conference visits, sponsored travel)*	**Listed on Website?**	**Add to Website?**

Source: EAB interviews and analysis.

Welcome Email from Major Gifts Team

Instructions

This tool has been designed by **Rice University** as a touch point for all new-hire MGOs. The email is provided to current MGOs who then send it to the new employee in their first week of employment. Provide this template to your MGO staff to welcome new team members to the division.

Welcome to the Team Email Template

Rice University

Congratulations on joining the Major Gifts team!

You are probably in your office, having just completed a whirlwind speed introduction session around the division (if not, just wait, its coming!). Now is your chance to catch your breath and start the process of ramping up your knowledge about what to do now that you are here.

First off, we want you to know that this training information was written by major gift officers at Rice to help you learn your way around this “small university.” We have all been where you are now and thought it would be helpful to have some tools to guide you during your first several weeks here. There is a lot to learn in order to represent Rice well, and this outline was created to provide you with a framework to learn the required information and processes at Rice without having to arrange numerous meetings. This won’t eliminate the need to meet people and develop relationships within the division and on campus, but it should give you a strong foundation for having more informed meetings instead of lots of follow-up meetings.

This is intended to be a self-directed study for training university gift officers who already possess 3-5 years of major gift experience. That said, you will want to sit down with your supervisor and review the “New Employee Calendar” and confirm the order in which you should complete this training. Depending on the needs of your position, you may need to complete the training out of sequence.

Be sure to check out the document titled “Training Resources and Links,” which is located in the Major Gift section of the Development and Alumni Relations Intranet, the same place you found this welcome message. The “Training Resources and Links” document is a great reference guide for nearly every aspect of your on-boarding process, and it provides numerous links and phone numbers you’ll need to accomplish several elements of your training. While you’re at it, we recommend you bookmark the Resource Development Intranet (RDI) homepage: webpage link here.

Good luck on your first few months. Feel free to call any of us and we will gladly meet you for a cup of coffee at the Brochstein Pavilion, just like someone did for us!

Cheers!

The Major Gifts Team

Source: EAB interviews and analysis.

Onboarding Calendar

Instructions

Managers and new-hire staff should complete this calendar designed by **Rice University** to ensure all onboarding materials are covered in the first few weeks of employment. New-hire staff should then keep a copy of this resource to ensure that their first year of employment at your institution is as successful as possible.

Employee Name: ________________________________ Hire Date: ______________

Manager Name: _________________________________ Department: ________________________________

First Week of Employment	Started *(Date)*	Completed *(Date)*
Complete HR paperwork and sign code of ethics		
Set up email, calendar, voicemail, and computer access		
Meet with supervisor to commence training		
Register for a student-led campus tour		
Order business cards		
Arrange two “get-to-know-you” lunches with key department staff		
Work on self directed training		
Obtain parking permit, Rice ID, Faculty Club Card, Purchasing Card		
First Month of Employment		
Continue to work on self-directed training		
Arrange to meet with your assigned researcher		
Meet weekly with supervisor		
Complete university-wide orientation course		
Attend major gifts meeting		
Attend database training with ___________________		
Shadow visits assigned by supervisor		
Register for relevant list-servs (e.g., ________________________)		
Attend external relations meeting		

Source: HR Investment Center interviews and analysis.

Onboarding Calendar (cont.)

Employee Name: ______________________________ Hire Date: _____________

Manager Name: _______________________________ Department: ______________________________

First Three Months of Employment	Started *(Date)*	Completed *(Date)*
Complete shadow visits		
Visit with planning gifts team		
Visit with alumni relations		
Visit with constituent relations		
Visit with development and presidential gifts		
Visit with principal gifts		
Check-in meeting with talent manager		
Be fully functional with email, voicemail, p-card, and calendaring		
Attend quarterly divisional meeting		
Complete three-month informal review with supervisor		
First Six Months of Employment		
Complete six-month review with supervisor		
Attend a university class		
Attend an athletic event		
Attend a performance in the arts department		

Source: HR Investment Center interviews and analysis.

MGO Training Checklist

Training Objectives and Expectations

Instructions

Managers should reference this checklist designed by **Rice University** to ensure all onboarding materials presented to new-hire MGO staff include the fundamental tools new MGOs will be required to have to be as successful in their roles in a limited amount of time.

After completing this training a Major Gift Officer will:

- ❑ Meet required standards of University employment: ID card, parking, required forms
- ❑ Perform basic job functions using email, phone, web, p-card and faculty club card
- ❑ Be trained in [DATABASES IN USE] and the Development and Alumni Relations Intranet
- ❑ Be knowledgeable about the structure and operations of the University and its Development and Alumni Relations Division
- ❑ Be knowledgeable about the history of [INSTITUTION] and it's leadership , presidential and school priorities, and relationships with university offices, schools, centers, institutes and programs
- ❑ Understand Development and Alumni Relations policies and procedures, particularly with regards to confidentiality and ethical conduct
- ❑ Gain knowledge of "ways to give" at [INSTITUTION] and understand gift policies
- ❑ Understand and support collaborative nature of division
- ❑ Have a clear understanding of performance plan, appraisal process, and assigned duties
- ❑ Gain familiarity with development messaging through observation of development officers in action
- ❑ Be sufficiently trained to make first solo visits by start of third month or as assigned by supervisor

Source: EAB interviews and analysis.

Vacancy Announcement Checklist

Instructions

The job posting checklist below ensures uniform application of vacancy announcements across the division to capture the greatest talent/applicant pool possible. While not necessary for every vacancy, it will be beneficial for job openings that are traditionally hard to fill.

Step One

Identify all internal and external locations where you traditionally post jobs. Prepare a spreadsheet with a column for the relevant units and a separate column where you can record the date the job was posted to that unit or job board. Use the sample below as a template.

Job Posting Checklist

Position: _______________ Department: __________ Hiring Manager: _________

Posting Location	Date Posted
Advancement team meetings	
Email to all advancement staff	
Alumni LinkedIn Circles	
Alumni website	
Email to managers in other units (e.g., admissions, athletics)	
Local job board (e.g., indeed.com)	
Industry-specific job boards (e.g., AFP)	
University's central HR website	

Step Two

Identify one staff member who can be responsible for ensuring that all job posting categories are complete within one week of initial posting. While this individual could be the hiring manager or strategic talent management staff, it could also be an AVP of Development or an administrative assistant.

Source: EAB interviews and analysis.

Manager Email Blast

Instructions

This resource can be used to get the most value out of your internal candidate pool. Internal hiring processes can be streamlined because the candidates already have good institutional knowledge and are in the HR database. Yet finding them, especially those outside the advancement division, can be challenging.

Complete the worksheet below to identify high-quality areas ripe for investment. The email template provided from the **University of Waterloo** will help you get the most value from your institutional staff.

Suggested units include admissions, athletics, marketing, and student affairs.

Step One: Internal Employee Worksheet

Position	*Former Department*	*Former Manager*

Step Two: Manager Referral Push

Advancement hiring managers should use the template below to ask managers in institutional partner units (identified in column three above) to identify top internal talent for open positions.

Dear Partner Unit,

There has recently been a vacancy in our office for the position of [Leadership Giving Officer]. We have hired successful candidates before from other units on campus and would appreciate any referrals that you could provide. The skillset for this position incudes:

- Communications
- Negotiations
- Critical thinking

For your reference the three people to last hold this position were John Locke, Adam Smith, and Judith Butler.

Please respond to this email with the names of any internal staff you consider qualified. Thank you in advance.

Sincerely,

Hiring Manager, Advancement

Source: EAB interviews and analysis.

Nontraditional Candidate Sourcing Road Map

Instructions

Career-changers can make great MGOs, but finding qualified applicants can be a challenge. Follow these steps to begin sourcing and recruiting qualified candidates from other industries in your community.

Step 1: Identify Organizations and Industries that are Potential Sources of Candidates

Nontraditional candidates most frequently come from the following types of organizations:

- Marketing and communications
- Arts and entertainment
- Technology and engineering
- Banking and finance
- Professional sports

In the spaces provided below, list local organizations that fall into these or similar industries. You may be able to generate additional names by searching LinkedIn or your Chamber of Commerce directory.

______________________________ ______________________________

______________________________ ______________________________

______________________________ ______________________________

Step 2: Locate Networking Opportunities

Work through the steps below to explore networking opportunities in your area.

- Local Chamber of Commerce meeting
    - Contact your city's Chamber of Commerce for an events calendar
    - Have any relevant events been scheduled? ______________________________
    - Is there a regular meeting of relevant individuals, for example, a monthly meeting of local business leaders? ______________________________
- Regional Rotary Club networking event
    - Contact your local Rotary Club for an events calendar
- Conferences for industry professional associations
- Affinity group meetings, for example, Hazelton Women in Business
- <u>Your chosen event info:</u>
    - Name of event: ____________________
    - Date and time: ____________________
    - Who will attend: ____________________

Source: EAB interviews and analysis.

Nontraditional Candidate Sourcing Road Map (cont.)

Step 3: Set a Goal for Each Event

Setting a goal for each event you attend will help you use your time effectively. These goals will depend on your office priorities and the situation. Some possibilities include:

- Gather five new individuals for the star file
- Meet one person employed at XYZ Marketing, Inc.
- Discover three new organizations that could be sources of candidates
- Explain fundraising as a career to six individuals

On the space below, list one or two goals you hope to accomplish at the event you listed in Step 2.

Source: EAB interviews and analysis.