Education Advisory Board | Advancement Forum

Competing for Talent

9 Strategies for Improving Major Gift Officer Recruitment

eab.com

Advancement Forum

Project Director

Liz Rothenberg, Ph.D.

Contributing Consultants

James Hurley

A.J. Nagaraj

Kristin Tyndall

Jeff Martin

Design Consultant

Joy Drakes

Managing Director

Melanie Ho, Ph.D.

Table of Contents

Unlimited Copies for Members

Resources for You and Your Staff

Copies of Education Advisory Board publications associated with the Advancement Forum are available to members in unlimited quantity and without charge. Additional copies can be obtained via our website, by email, or by telephone. Electronic copies are also available for download from our website.

TO ORDER VIA EAB.COM

Publications can be ordered at **www.eab.com**

TO ORDER VIA EMAIL

Please address your email to **research@eab.com** with "Advancement Forum 'Competing for Talent' Request" in the subject line, or reach out to your Dedicated Advisor.

In your email please include the number of publications desired, your name, your institution, a contact phone number, and your shipping address. We apologize that we cannot ship materials to a P.O. Box.

TO ORDER VIA PHONE

Please call 202-266-5920 to speak with a Delivery Services associate.

Other Publications Available from the Advancement Forum

Disruptive Innovations in University Fundraising
Creating a Culture of Giving Among Current Students

About the Advancement Forum

Serving Chief Advancement Officers

Our Parent Firm: The Advisory Board Company

Founded in 1979 to serve hospitals and health systems, The Advisory Board Company is one of the nation's largest research and consulting firms serving nonprofit, mission-driven organizations. With a staff of over 2,300 employees worldwide, including 1,150 in Washington, D.C., we serve executives at about 3,000 member organizations in more than two dozen countries, publishing 150 major studies every year on progressive management practices.

Our Work in Higher Education: The Education Advisory Board

Encouraged by leaders of academic medical centers that our model and experience serving nonprofit institutions might prove valuable to colleges and universities, The Advisory Board Company launched a higher education practice in 2007. We are honored to serve over 800 college and university executives through our Education Advisory Board memberships.

Research and Insights

Academic Affairs Forum

Strategic advice for provosts to elevate performance in teaching, research, and academic governance

Business Affairs Forum

Research and support helping CBOs improve administrative efficiency and lower costs

Student Affairs Forum

Research helping student affairs improve student engagement and perfect the student experience

Community College Executive Forum

Strategic advice for community college leaders on strengthening student success, workforce development, and institutional planning

Continuing and Online Education Forum

Research on continuing and online education program growth, revenues, and academic quality

Information Technology Forum

Research for CIOs on leveraging information and technology to further higher education

Enrollment Management Forum

Guidance and support for chief enrollment officers to overcome today's enrollment challenges

Advancement Forum

Research and performance analytics for development officers to elevate fundraising performance

Performance Technologies

University Spend Collaborative

Business intelligence and price benchmarking to help institutions better manage procurement and outside spend

University Student Success Collaborative

Predictive modeling and academic milestone tracking to help universities improve completion and time to degree

Community College Student Success Collaborative

Student support tool for college navigation and career pathing to help colleges improve graduation and employment outcomes

Advisors to Our Work

American University
Peter Caborn Edelman
Assistant Vice President of Campaigns and Planning

Thomas Minar
Vice President of Development and Alumni Relations

Auburn University
Jane DiFolco Parker
Vice President for Development and President, Auburn University Foundation

Bellarmine University
Glenn Kosse
Vice President for Development and Alumni Relations

Ian Patrick
Assistant Vice President for Development

Berea College
Michelle Janssen
Vice President of Alumni and College Relations

Boston College
Beth McDermott
Associate Vice President, Capital Giving

Brown University
Don Hasseltine
Vice President for Development

Matt Rizzo
Associate Vice President for Development

Bryant University
James Damron
Vice President for University Advancement

Bucknell University
Kathy Graham
Associate Vice President of Development and Alumni Relations

Scott Rosevear
Vice President for Development and Alumni Relations

California Institute of Technology
Christy Cates
Senior Director, Talent Management

Donna Gastevich
Associate Vice President of Advancement Services and Chief Operating Officer

Mark Longo
Director of Strategic Initiatives

Katrina Onkerdonk
Talent Acquisition Manager

California State Polytechnic University, Pomona
Michelle Stoddard
Acting Vice President for Advancement

Carnegie Mellon University
Pam Eager
Associate Vice President for Development

Kathy Lachenauer
Associate Vice President for University Advancement

Case Western University
Carol Moss
Vice President, Medical Development

Clemson University
Missy Ryan Penland
Senior Director of University Development

The College of William & Mary
Kristin Heller
Executive Director of Prospect Development and Information Strategy

Matthew Lambert
Vice President for Development

Sani Silvennoinen
Executive Director of Regional and International Advancement

Colorado State University
Brett Anderson
Vice President for Advancement

Kim Tobin
Assistant Vice President for Development

Columbia University
Brian Chapman
Executive Director for Analytics & Business Strategy

Cornell University
Laura Toy
Principal Gifts Officer

Cornett Consulting
Shawn Cornett
Principal

Dalhousie University
Peter Fardy
Assistant Vice President, Advancement & Chief Development Officer

Dartmouth College
Cornelia Purcell
Senior Managing Director of the Dartmouth College Fund

DePaul University
Abena Apea
Associate Vice President, Advancement

Judy Martinez
Director, Advancement Operations

Sara Miller-Acosta
Associate Vice President, Development

Advisors to Our Work (cont.)

Elon University
Jim Piatt
Vice President for University Advancement

Emerson College
Jeffrey Schoenherr
Vice President for Development and Alumni Relations

Emory University
Michelle Rosenthal Clark
Assistant Vice President, Development and Alumni Relations

Ben Tompkins
Associate Vice President, Operations

Florida Institute of Technology
Susan St. Onge
Senior Vice President for Development

Michael Seeley
Vice President for Development

George Mason University
Janet Bingham, Ph.D.
Vice President, Advancement and Alumni Relations and President, George Mason University Foundation

Christine Clark-Talley
Associate Vice President, Alumni Relations

Jim Laychak
Associate Vice President, University Advancement

David Long
Associate Vice President, Campaign Programs

Arati Seth
Associate Vice President, Development Services

George Washington University
Sylvia Galen
Assistant Vice President, Development and Alumni Relations

Golden Gate University
Tasia Neeve
Vice President, University Advancement

Harvard University
Beth MacGillivray
Director, Major Gifts, Harvard Business School

Imperial College London
Angela Bowen
Deputy Director of Development

Iona College
Kristen Mengold
Vice President for Advancement and Alumni Relations

Iowa State University
Larissa Holtmeyer-Jones
Vice President for Development

Kevin Stow
Assistant Vice President of Human Resources and Governance, University Foundation

Johns Hopkins University
Robert Spiller
Associate Vice President, Development and Alumni Relations

Jonathan Thompson
Senior Staffing Consultant, Development and Alumni Relations

Kean University
Carla Willis
Vice President for Institutional Advancement

La Salle University
Brian Elderton
Vice President for University Advancement

Lehigh University
Carl Henzelman
Interim Assistant Vice President, Leadership Gifts

Lewis University
Luigi Amendola
Associate Vice President for University Advancement

Massachusetts Institute of Technology
Lorraine Ng
Director, HR and Strategic Talent Management

Mike McNally
Executive Director of Individual Giving

Jim Montague
Executive Director of HR and Strategic Talent Management

Jill Soucy
Senior Director of HR and Strategic Talent Management

Tracey Woodbury
Senior Recruiter, Office of HR and Strategic Talent Management

David Woodruff
Associate Vice President and Chief Operating Officer

McGill University
Anne Carbonneau
Managing Director, Development Programs

Royal Govain
Managing Director, Volunteer Partnerships

Marc Weinstein
Vice-Principal, University Advancement

Advisors to Our Work (cont.)

Memorial University of Newfoundland
Penny Blackwood
Executive Director, Alumni Affairs and Development

Jennifer O'Neill
Associate Director, Development

Miami University
Brad Bundy
Senior Associate Vice President and Campaign Director

Missouri University of Science and Technology
Lea-Ann Morton
Assistant Vice Chancellor for University Advancement

Joan Nesbitt
Vice Chancellor for University Advancement

Montclair State University
Jack Shannon
Vice President, University Advancement

North Carolina State University at Raleigh
Laurie Reinhardt-Plotnik
Associate Vice Chancellor for University Development

Northeastern University
Diane MacGillivray
Senior Vice President for University Advancement

Kristin Pohl
Director, Talent Management & Organizational Development

Northern Arizona University
Betsy Mennell
Associate Vice President, Development

Northern Kentucky University
Eric Gentry
Vice President for University Advancement

Northwestern University
Bob McQuinn
Vice President for Alumni Relations and Development

Karyn Reif
Associate Vice President of Alumni Relations & Development

Heather Ruggio
Executive Director, Alumni Relations & Development Services

Matt Ter Molen
Associate Dean for Development and Corporate Relations

Ohio State University
Mike Eicher
Senior Vice President for Advancement

Ann Metzler
Manager, Training and Recruitment, University Foundation

Oregon State University
Mark Koenig
Senior Director for Advancement Services

Shawn Scoville
Executive Vice President for the Oregon State University Foundation

Phillips Academy Andover
Thom Lockerby
Secretary of the Academy

Point Loma Nazarene University
Joe Watkins
Vice President of External Relations

Portland State University
Françoise Aylmer
President and CEO of the Portland State University Foundation

Lynn Barger
Associate Vice President, Campaigns and Advancement Operations

Princeton University
Steve Staples
Director, Leadership Gifts

Rice University
Ben Renberg
Associate Vice President for Resource Development

Iska Wire
Senior Director of Talent Management & Organizational Development

Darrow Zeidenstein
Vice President for Resource Development

Rutgers University
Julie Shadle
Vice President for Campaign and Development Operations

Ryerson University
Adam Kahan
Vice-President, University Advancement

San José State University
Rebecca Dukes
Vice President for University Advancement

Saint Leo University
Denny Moller
Vice President, University Advancement

Samford University
Randy Pittman
Vice President of University Relations

Advisors to Our Work (cont.)

Seton Hall University
David Bohan
Vice President for University Advancement

Simon Fraser University
Chris Arnet
Executive Director, Advancement

Cathy Daminato
Vice-President, Advancement and Alumni Engagement

Southern Illinois University-Edwardsville
Patrick Hundley
Vice Chancellor for University Relations

Rachel Stack
Vice Chancellor for University Advancement

State University of New York-Buffalo
Nancy Wells
Vice President for Development and Alumni Relations

State University of New York-Stony Brook
Dexter Bailey
Senior Vice President for University Advancement and Executive Director, Stony Brook Foundation

Greg Duyck
Senior Associate Vice President for Advancement

Stephen F. Austin State University
April Smith
Associate Director of Development

Stonehill College
Sarah Varadian
Interim Director, Center for Nonprofit Management

Teach For America
Sean Waldheim
Vice President, Admissions

Tennessee Technological University
Mark Hutchins
Vice President for University Advancement

Trinity International University
Joel Dillon
Senior Director of Development

Tufts University
Margot Biggin
Executive Director of University Advancement

Eric Johnson
Vice President for University Advancement

Tulane University
Ginny Wise
Vice President, Development—Leadership Giving

University of Alabama-Birmingham
Tom Brannan
Associate Vice President for Development

Michelle Hussey
Assistant Vice President for Advancement Services

Rebecca Gordon
Associate Vice President for Development

University of Alberta
O'Neil Outar
Vice President of Advancement

University of Calgary
Gary Durbeniuk
Vice President, Development—Leadership Giving

University of California, Berkeley
Jeff Jackanicz
Executive Director, Corporate and Foundation Relations & Leadership Gifts

University of California, Davis
Shaun Keister
Vice Chancellor for Development and Alumni Relations

Kate Moses
Senior Development Analyst

Paul Prokop
Associate Vice Chancellor for Development

University of California, Irvine
Gregory Leet
Vice Chancellor for University Advancement

Babette Vogel
Chief of Staff, University Advancement

University of California, Los Angeles
Rhea Turteltaub
Vice Chancellor, External Affairs

University of California, Riverside
Peter Hayashida
Vice Chancellor for University Advancement

University of California, San Diego
Kristin Bertell
Vice Chancellor for Development, Health Sciences

University of Central Florida
Joyce Henckler
Chief Development Officer, UCF Foundation

Kara Fleharty Schultz
Assistant Vice President, Development

University of Chicago
Stephanie Banta
Associate Vice President for Individual Giving

Advisors to Our Work (cont.)

University of Cincinnati
Dee Robinson
Vice President for Development

University of Delaware
Beth Brand
Associate Vice President of University Development

University of Denver
Mike McCall
Associate Vice Chancellor, University Advancement

University of Florida
Sonya Allen
Talent Acquisition Coordinator

Tara Blythe
Associate Vice President for Talent Management Strategy and Planning for the Offices of Development and Alumni Affairs

Kristin Green
Associate Director of Talent Development

Tom Mitchell
Vice President for Development and Alumni Affairs

University of Georgia
Mac Corry
Associate Vice President for Development

Robert Hawkins
Campaign Counsel

Tom Landrum
Vice President for Development and Alumni Relations

Heather Malcom
Chief of Staff for Development

University of Idaho
Chris Murray
Vice President of Advancement

University of Kentucky
Eric Crowden
Senior Director, Prospect Management and Development

Mike Richey
Vice President for Development and Chief Development Officer

University of Maryland, Baltimore
Mickey Dowdy
Chief Development Officer and Vice President

University of Maryland, College Park
Lyn Culver
Executive Director of Development

University of Miami
Sergio Gonzalez
Senior Vice President for University Advancement and External Affairs

Ann House
Associate Vice President for Advancement Services

University of Michigan
Melissa Arnett
Recruitment Coordinator

Dondi Cupp
Associate Vice President for Development

Erin Hall-Westfall
Executive Director, Talent Management

University of Mount Union
Greg King
Vice President for College Advancement

University of New England
Bill Chance
Vice President, Institutional Advancement

University of North Alabama
Dan Hendricks
Vice President for Advancement

University of North Carolina at Chapel Hill
Diane Frazier
Director of Major Gifts

University of North Carolina at Charlotte
Harry Creemers
Senior Director of Development

University of North Dakota
DeAnna Carlson Zink
Executive Vice President and Chief Executive Officer, UND Alumni Association and UND Foundation

University of Notre Dame
Brad Goff
Business Manager, Alumni Association Office

Micki Kidder
Associate Vice President for Development

Ann Moran
Senior Recruiting Consultant

University of Nottingham
Elspeth Gilfillan
Director of Philanthropy

University of Oregon
Mike Andreasen
Vice President for University Advancement

Paul Elstone
Associate Vice President for Development

University of Pennsylvania
John Zeller
Vice President for Development and Alumni Relations

Advisors to Our Work (cont.)

University of Pittsburgh
Albert Novak
Vice Chancellor for Institutional Advancement

David Dallesandro
Associate Vice Chancellor, University Development

University of Richmond
Tom Gutenberger
Vice President for Advancement & Alumni Relations

University of Rochester
Jonathan Schwartz
Senior Associate Vice President for Advancement

Holly Wolk
Senior Director of Talent Management, Recruitment and Employee Development

University of Saint Joseph
Doug Nelson
Vice President, Institutional Advancement

University of Saskatchewan
Kent Hartshorn
Executive Director, Development

Heather Magotiaux
Vice-President, University Advancement

University of South Carolina
Susan Lee
Senior Associate Vice President for Development

University of Southern California
Matt DeVecchi
Senior Associate Dean, External Relations, Marshall School of Business

Jim Ellis
Dean, Marshall School of Business

Julie Lucas
Associate Senior Vice President for University Advancement

Neil Macready
Senior Associate Dean for Advancement, Dornsife College of Letters, Arts, and Sciences

University of Texas-San Antonio
Marjie French
Vice President for External Relations, Chief Development Officer

University of the Pacific
Burnie Atterbury
Vice President for University Development and Alumni Relations

University of Utah
Carla Flynn
Associate Vice President for Development

University of Virginia
Kelley Tobler
Senior Human Resources Generalist, University Advancement

University of Waterloo
Erin Sargeant Greenwood
Associate Vice President, Campaign Strategy & Implementation

Mike den Haan
Associate Vice-President, Principal Gifts

University of Wisconsin-Oshkosh
Arthur Rathjen
Foundation President, Executive Director of Advancement

Vassar College
Natasha Brown
Assistant Vice President for Individual Giving

Virginia Commonwealth University
Samantha Wheeler Marrs
Senior Associate Vice President for Development Operations

Wake Forest University
Micah Howard
Chief of Staff for University Advancement

Mark Petersen
Vice President for University Advancement

Washburn University
JuliAnn Mazachek, Ph.D.
President, Washburn University Foundation

Randall Scott
Executive Director of Major & Planned Giving, Washburn University Foundation

Wheaton College
Erin Shade
Director of Annual Giving and Development

Whittier College
Elizabeth Power Robison
Vice President for Advancement and Strategic Initiatives

Wilfrid Laurier University
Robert Donelson
Vice-President, Development & Alumni Relations

Jana Gordon
Assistant Vice-President, Development & Campaign Director

Witt/Kieffer
Jon Derek Croteau
Senior Partner

Zach Smith
Search Consultant

Top Lessons from the Study

Gaining an Advantage in the Bidding War for Talent

The market for major gift officer talent is more competitive than ever before. Colleges and universities must improve their recruiting efforts if they are going to successfully attract high-quality fundraisers.

Demand for fundraisers has exceeded pre-recession levels. Higher education institutions are relying on major gifts to replace other sources of revenue that have been cut or reduced. Simultaneously, other nonprofits are expanding into the major gifts fundraising space and competing with universities for fundraisers. This environment has created a seller's market in which highly qualified gift officers can choose between an abundance of employment opportunities.

Consistently High Demand

68%	1	14%
Of fundraisers have never experienced any lag between jobs	Average number of months between jobs for fundraisers who experienced any lag	Of fundraisers have sought work longer than three months at least once in their career

Colleges and universities typically prefer experienced fundraisers, but these individuals are the most difficult and expensive to recruit. Institutions can side-step the "salary arms race" by proactively identifying strong candidates, customizing their approach based on institutional need, and accelerating gift officers' transitions into the organization.

Salaries for experienced major gift officers have risen exponentially alongside demand, creating significant salary inflation that has posed challenges for many institutions. Fortunately, non-monetary factors like office culture and professional development opportunities play as big a role in career decisions as financial compensation. Innovative institutions proactively seek out strong candidates, build long-term candidate pipelines, design a hiring and interview process that puts the candidate's needs first, and provide a holistic onboarding program to accelerate full productivity.

"How important were the following factors in your decision to join your current institution?"

EAB 2014 MGO Survey
n=1,217

Ranking	Tuition Reimbursement	Financial Compensation	Professional Development	Office Culture
Very Important	7%	34%	36%	36%
Important	11%	43%	43%	37%
Somewhat important	19%	18%	14%	18%

Source: Burk P, *Donor Centered Leadership*, Chicago: Cygnus Applied Research, 2013; EAB interviews and analysis.

Top Lessons from the Study (cont.)

Gaining an Edge on the Competition in the Bidding War for Talent

Internal staff can be an excellent source of future major gift officers. However, they often encounter challenges to moving into development roles. Common difficulties include a lack of opportunities to express interest and few pathways for exploring the profession.

Internal staff bring a range of strengths to fundraising positions, including knowledge of and contacts from other areas of the university. However, recruiting practices often cater to external candidates and unwittingly create a variety of barriers to internal candidates. To build a strong internal pipeline, advancement leaders should both encourage interested staff to apply and proactively identify potential candidates.

Common Challenges for Internal Talent

Lack of Structured Opportunities

- Managers rarely discuss professional development in a structured format
- Managers typically combine performance review appraisals and professional development conversations

Hesitant to Reach Out

- Employees worry that an informational interview may signal to their managers that they are unsatisfied in their current role
- Employees fear that professional development opportunities might hamper their current career trajectory

Unaware of Internal Opportunities

- Programs are not advertised in a systematic manner
- Staff members lack visibility into training offered by other departments and campus-wide opportunities

Some institutions look out of industry for fresh fundraiser talent, but it can be difficult to establish networks and pipelines for connecting with the right individuals.

A wide variety of professions cultivate skill sets that can transfer to major gift officer roles. This means that the population of potential nontraditional candidates is overwhelmingly large. Many advancement leaders would like to diversify their talent pools by dipping into the out of industry market, but they do not know where to start. From the general population, colleges and universities should identify and focus on those individuals who will be the best fit for the role. Some institutions have found success by leveraging their alumni networks and hosting networking events.

Key Concerns for Out-of-Industry Hires

Where do I start?

- Wide range of industries teach transferrable skills
- Availability and type of candidates varies by region
- One-off hires from unlikely backgrounds (e.g., hotel manager, clergyman)

How do I approach them?

- Unclear level of affinity or interest in career
- Difficult to generalize across broad populations

What is the ROI?

- Difficult to scale or adapt traditional recruiting strategies
- Considerable upfront training and support costs
- Overall returns uncertain

Source: EAB interviews and analysis.

Study Road Map

The Major Gift Officer (MGO)

The major gift officer (MGO) fills one of the most mission-critical roles in today's advancement shop. Despite their importance, qualified candidates are scarce. This situation has led to intense competition between nonprofit institutions for quality fundraisers. Chief Advancement Officers (CAOs) struggle to recruit and retain MGOs in the current market.

Advancement offices must learn to successfully compete for MGO talent if they are going to meet their fundraising goals.

An Overview of the Current Landscape

The MGO in Brief

- Also called Directors of Development or Development Officers
- Fundraisers responsible for raising between $100K and $10M per year from high-net-worth individuals
- Key responsibilities include identifying, qualifying, cultivating, and soliciting prospective donors

MGO Quick Facts

Gender: 71% female, 29% male

Age:

- Under 35 = 6%
- Aged 35-55 = 66%
- Aged 55 and over = 28%

Ethnicity: 95% Caucasian, 5% other

2 years

Median tenure of MGOs at colleges and universities

`Source: Burk P, *Donor Centered Leadership,* Chicago: Cygnus Applied Research, 2013; *2014 Compensation and Benefits Study*, Arlington, Virginia: Association of Fundraising Professionals, 2014; 2014 EAB MGO Survey; EAB interviews and analysis.

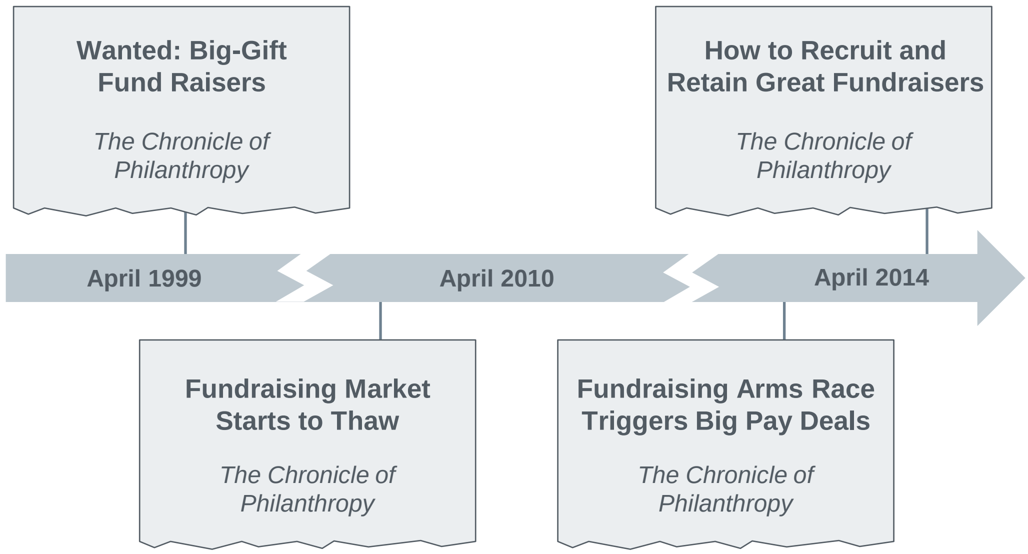
Talent Shortage Is an Evergreen Issue

Though it's received a lot of press recently, the MGO talent shortage is not a new issue for advancement leaders. Fundraisers have been in high demand for decades.

Demand only appears to have surged recently because the recession temporarily masked the imbalanced talent market. During the recent recession, demand for fundraisers briefly cooled off as organizations froze hiring and eliminated positions.

However, the market has rebounded strongly in the last few years. In fact, many CAOs say it is even harder to hire a fundraiser today than it was 10 years ago.

Fundraising Talent Market Reenergizes as Recession Ends



Consistently High Demand

68%	1	14%
Of fundraisers have never experienced any lag between jobs	Average number of months between jobs for fundraisers who experienced any lag	Of fundraisers have sought work longer than three months at least once in their career

Source: Hall H, "Wanted: Big-Gift Fund Raisers," *Chronicle of Philanthropy*, April 1999; Hall H, "Fund-Raising Jobs Appear to Be Sprouting, but the Thaw May Not Last," *Chronicle of Philanthropy,* April 2010; Daniels A, et al., "Fundraising 'Arms Race' Triggers Big Pay Deals," *Chronicle of Philanthropy,* April 2014; Hall H, et al., "How to Recruit and Retain Great Fundraisers," *Chronicle of Philanthropy,* April 2014; Burk P, *Donor Centered Leadership*, Chicago: Cygnus Applied Research, 2013; EAB interviews and analysis.

Philanthropic Gifts Help Fill Budget Gaps

In addition to a strong economy, university budget deficits have driven today's demand for MGO talent. Traditional sources of revenue such as tuition, state appropriations, and federal research funding are levelling off or declining. Many institutions struggle to gain stable footing in this rapidly shifting landscape.

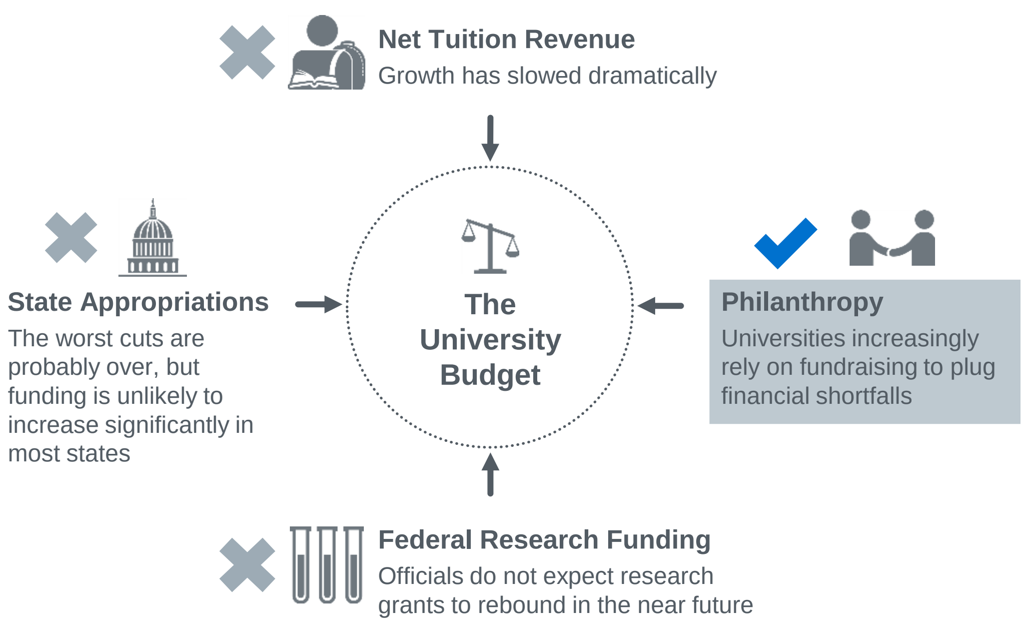
Increasingly, university leaders look to philanthropy as a viable source of funding. Colleges and universities are launching longer, more ambitious campaigns with bigger dollar goals. Of the 31 schools with capital campaigns of $1 billion or greater, 15 have goals exceeding $2 billion.

Universities More Reliant on Voluntary Support as Other Revenues Decline

$1B Campaigns

31

Number of US institutions involved in $1B+ capital campaigns



Source: *Chronicle of Higher Education*, institution web sites; EAB interviews and analysis.

The Top-Heavy Gift Pyramid

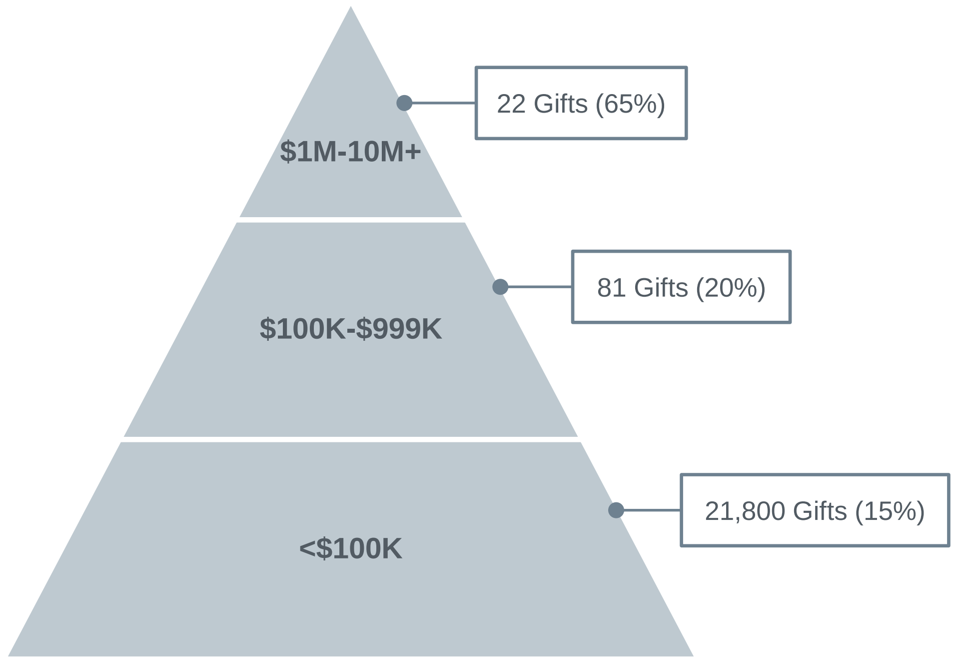
To ensure the success of such ambitious campaigns, colleges and universities primarily turn to major gifts. The vast majority of total dollars raised comes from large individual gifts at the peak of the gift pyramid.

Unsurprisingly, institutions preparing to launch billion-dollar campaigns staff up to meet the challenge. Some reports indicate that they increase their staff sizes by up to two-thirds. Many of these new hires are major gift fundraisers.

Bottom Line Increasingly Dependent on Major Gifts

Number of Gifts and Percentage of Total Funds at Each Level

Private Research University



Source: EAB interviews and analysis.

Explosive Growth in the Nonprofit Sector…

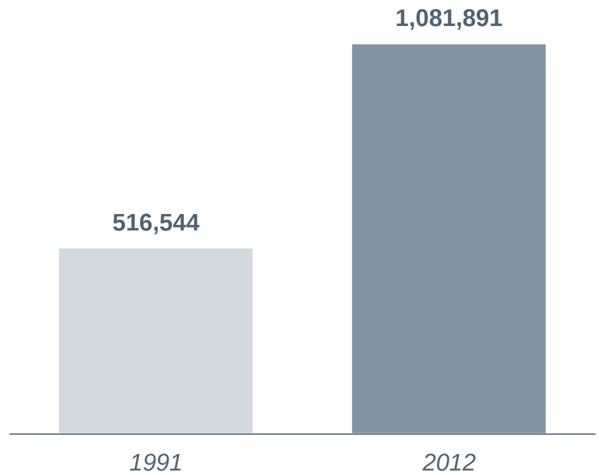
Unfortunately, as universities rely more on MGOs for revenue, the MGOs themselves rely less on universities for employment. Their job prospects have never been brighter. The number of nonprofit organizations in the United States has nearly doubled in the last 20 years, creating endless opportunities for frontline fundraisers.

These organizations all compete with college and university advancement shops to hire fundraisers, create relationships with donors, and build a fundraising base.

…Intensifies Competition for MGOs

Registered 501(c)(3) Organizations

Chronicle of Philanthropy, 2013



Everyone Wants an MGO

"We have experienced enormous growth in the not-for-profit sector.…It seems that new organizations are springing up daily.…Because direct mail has gotten so costly and special events are not cost effective, all of a sudden everybody realizes the importance of major gifts or planned giving to build the asset base and endowment for the future. Everyone wants someone to do the job, but there simply aren't enough trained development professionals to go around."

Colette M. Murray
CEO
Paschal-Murray Executive Search

Source: Frostensen S, "Number of Charities and Foundations Rose Slightly in 2012," *Chronicle of Philanthropy*, April 4, 2013, http://philanthropy.com/article/Number-of-Charities-and/138277/; Harrison, B, "The Seductive Lure of Creative Compensation," http://www.cdsfunds.com/the_seductive_lure_of_creative_compensation.html; EAB interviews and analysis.

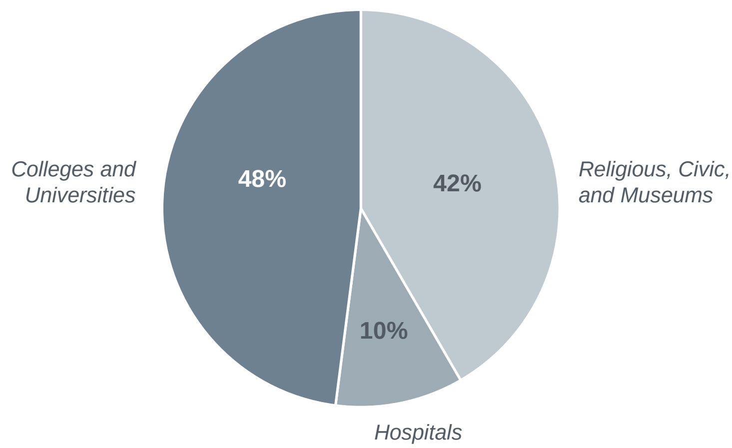
Fundraising Skills in High Demand

Nonprofits in other industries are experiencing the same budget crises as universities—and also taking note of the value of major gifts fundraising. A range of nonprofits, hospitals, and health care systems now compete with universities for talented MGOs.

Job Ads Across the Nonprofit Sector

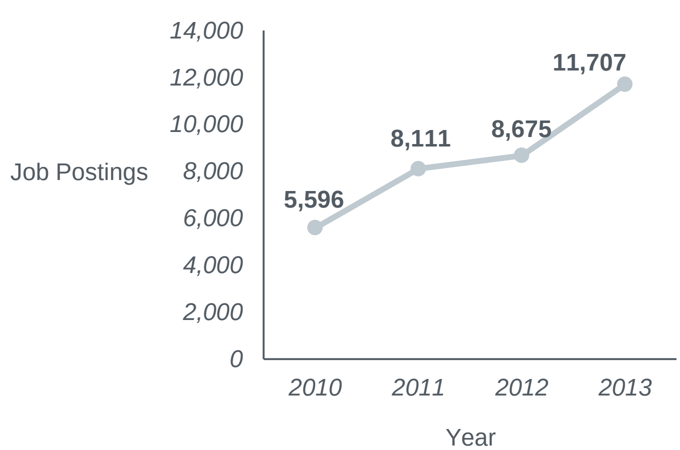
Industry Job Postings Requesting Fundraising Skill

Burning Glass Labor/Insight™ Last 12 Months[1]



Health Care Job Postings Requesting "Fundraising" Skill

Burning Glass Labor/Insight™ 2010-2013



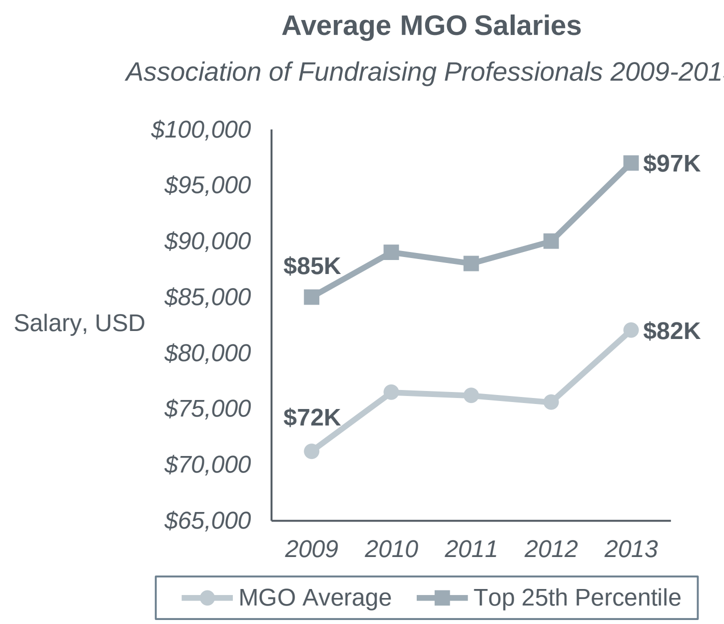
1) Burning Glass, a Boston-based firm, specializes in the use of web spidering technology and artificial intelligence engines to mine more than 80 million online job postings for real-time employer demand data. Under the partnership, the Education Advisory Board may use certain features of Burning Glass's proprietary tool called Labor/Insight™ to answer common member questions about employer demand for specific educational requirements, job titles, and competencies over time and by geography.

Source: Burning Glass Labor/Insight, http://www.burning-glass.com/products/laborinsight-market-analysis; HigherEdJobs job listings, http://www.higheredjobs.com/default.cfm; EAB interviews and analysis.

An Upward Trajectory

As demand for MGOs rises, salaries skyrocket. Average salaries increased about 13% in the last five years, creating a bidding war for talent. Increased salaries further complicate efforts to recruit MGOs, as many advancement shops question whether these salary levels are sustainable.

Increases in MGO Salaries Across the Past Few Years



Creative Compensation

"The war for talent is a bidding war and prices are really being driven up because of the dearth of talent. Contracts, signing bonuses and creative compensation are going to become more common."

"With so much riding on the shoulders of the development professional, organizations realize they must become more creative with compensation packages. [It is] supply and demand."

Christopher Bryant
Chief Executive Officer
AST/BRYANT

Source: *2014 Compensation and Benefits Study*, Arlington, Virginia: Association of Fundraising Professionals, 2014; Harrison, B, "The Seductive Lure of Creative Compensation," http://www.cdsfunds.com/the_seductive_lure_of_creative_compensation.html; EAB interviews and analysis.

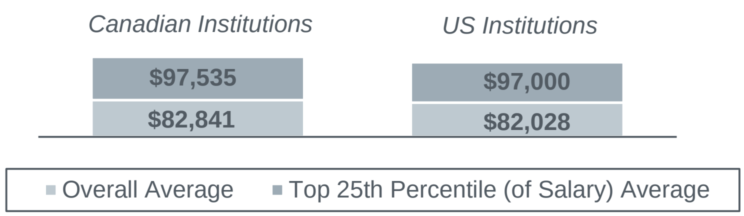
Measuring MGO Compensation

Not all institutions feel the effects of the bidding war equally. Average compensation varies by region, country, and experience level. For example, the average salary in the South-Central U.S. is about 14% lower than the average salary in the Northwest. Experienced fundraisers, who are in greater demand, command salaries about 33% higher on average than their less experienced counterparts.

Examining Pay Differences Across North American Fundraisers

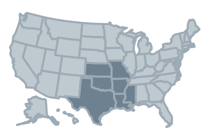
Average MGO Salaries

Association of Fundraising Professionals, USD



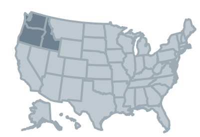
Range of MGO Salaries Across U.S. Regions

Association of Fundraising Professionals, USD



$70,115

The average salary for fundraisers in the South Central region of the US



$81,747

The average salary for fundraisers in the Northwest region of the US

Experience at a Premium

$117K-$130K

Compensation range for fundraisers with more than 25 years of experience

Source: *2014 Compensation and Benefits Study,* Arlington, Virginia: Association of Fundraising Professionals, 2014; EAB interviews and analysis.

A Mass Exodus?

Unfortunately, at the exact moment when demand for MGOs is rising, evidence suggests that several factors will prevent supply from keeping pace. In particular, a looming wave of senior fundraiser retirements across the next five to 10 years will strain the already diminished talent pool.

Concerns about the impact of these retirements led to a call to action in the 2013 report *UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising*. The study urges advancement leaders to cultivate the next generation of talent and diversify the talent pool by recruiting more minorities and young people
to fundraising.

Looming Waves of Senior Fundraiser Retirements

A Diminishing Supply…

20%
Of senior fundraisers plan to retire from fundraising in the next four years

29%
Of senior fundraisers plan to retire in the next five to 10 years

40%
Of chief fundraisers thinking of leaving fundraising entirely

…Creates a Call to Action

UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising

- Elevate the fundraising profession by promoting it as a rewarding career, and one that plays a central role in helping charities create social change
- Train board members more thoroughly, emphasizing partnerships with the charity’s executives as well as nuts-and-bolts fundraising skills
- Strengthen and diversify the talent pool, especially by recruiting more minorities and young people

Source:, Burk P, *Donor Centered Leadership*, Chicago: Cygnus Applied Research, Inc., 2013; Berkshire J, “Half of Fundraisers in the Top Job Would Like to Quit,” *The Chronicle of Philanthropy*, 2013; Bell J, Cornelius M, *UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising*, 2013; EAB interviews and analysis.

Helping Practitioners Meet Job Demands

One way to strengthen the talent pipeline is to create more entry points, pathways, and trainings for practitioners. A growing number of master's level programs in fundraising and philanthropy have risen to serve this need. Established programs like the Center on Philanthropy at Indiana University have been joined by newer programs created in the last five to seven years at Columbia University, LaGrange College, and New York University.

A Growing Number of Masters-Level Fundraising Programs

Institutions Offering Master's-Level Programs in Fundraising and Philanthropy

INDIANA UNIVERSITY

Saint Mary's University OF MINNESOTA

COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK

LAGRANGE COLLEGE

UNIVERSITY of DENVER

NEW YORK UNIVERSITY

Programs at a Glance

Annual Tuition: \$15,000-\$60,000

Length: 2-3 years

Average Student Age: 26

Student Profile: Mainly from US and Canada, but growing numbers of international students

Topics Covered

- Fundraising ethics
- Board governance
- Financial management
- Strategic grant writing
- Cultivating donor relationships

Source: Gose B, "Master's Programs in Fundraising Are Helping Students Meet Job Demands." *The Chronicle of Philanthropy*, June 16, 2014; EAB interviews and analysis.

Is Rapid Turnover a Generational Trend?

While master's level programs can expand the talent pipeline in the short term, they may not be able to overcome distressing trends negatively affecting retention in the long term.

The next generation of MGOs has little interest in settling into fundraising positions. Millennials and Gen-Xers stay in fundraising roles for significantly shorter periods of time than baby boomers. Although the root cause for this difference remains under debate, the bottom line is that this trend has serious implications for our institutions.

Retention Concerns with Younger MGOs

Average Length of Stay in MGO Role	Respondent's Age			
	Under 30	30-44	45-60	61+
Most recent position	1.6 years	3.5 years	4.2 years	6.5 years
Second most recent position	1.8 years	3.0 years	4.0 years	5.8 years
Third most recent position	1.0 years	2.9 years	2.4 years	4.3 years

By the Numbers

16
Average number of months fundraisers under 30 spend in each MGO role

10-12
Months MGOs under 30 believe it takes for them to attain full productivity

4
Months at top productivity for MGOs under 30

Source: Burk P, *Donor Centered Leadership*, Chicago: Cygnus Applied Research, 2013, p. 44; EAB interviews and analysis.

The Impact of the Talent Crunch

The consequences of the talent crunch are extensive. Difficulties in recruitment and retention have meant that advancement leaders are left dealing with long MGO vacancies, unsuccessful searches, wasted staff time, expensive search firm bills, lost revenue, and damaged donor relationships. In many cases, advancement leaders find they must settle for whichever candidates they come across, regardless of the individuals' fit with their institutions.

Interviewees noted that the old approach to recruitment—where they posted a vacancy and waited for the applications to roll in—just isn't working anymore. Institutions of all types are facing this issue. Publics and privates, rural and urban, and US and Canadian institutions have all seen their traditional recruitment methods fall flat.

Admittedly, recruiting is only one part of the talent equation. Retention also plays a key role in building and sustaining a high-performing organization. Yet retention strategies won't achieve their goals if advancement leaders select the wrong candidates for MGO positions and fail to onboard them effectively. Smart, proactive recruiting minimizes the need for investments in retention initiatives.

Direct and Indirect Costs of Open MGO Positions

Cost Summary

$127,650	117%	$1M+
Direct and indirect costs of finding a replacement fundraiser	Cost of staff turnover as a percentage of salary	Estimated loss of gifts across six month vacancy and six month onboarding

Sources of Recruiting Costs

- Marketing and search fees
- Staff interview time
- Onboarding programs
- Lost philanthropic gifts

The Grass Isn't Greener

Rural Institutions

Struggle to recruit top talent to remote locations

Urban Institutions

Struggle to retain top performers in highly competitive markets

Source: Burk P, *Donor Centered Leadership*, Chicago: Cygnus Applied Research, 2013; EAB interviews and analysis.

Study Road Map

1 | The Fundraiser Talent Crisis

2 | **Traditional Candidates**

Strategy #1: Systematize Vacancy Planning

Strategy #2: Move to Proactive Pursuit

Strategy #3: Develop Candidate-Centered Recruiting

Strategy #4: Accelerate Acculturation and Productivity

Strategy #5: Unlock Strategic Talent Management

3 | Internal Candidates

Strategy #6: Cultivate Students for Fundraising Careers

Strategy #7: Create Channels for Self-Identification

Strategy #8: Develop Internal Referral Mechanisms

4 | Nontraditional Candidates

Strategy #9: Establish Networks and Pipelines

5 | Toolkit Resources

Departure Risk Appraisal

Social Media Referral Campaign Strategy Guide

Candidate Competency Worksheet

Interview Evaluation Matrix Competency Assignments

Competency Question Bank

Defining the Traditional Candidate

When seeking a new hire, most CAOs prefer a candidate who has experience in major gifts fundraising at a higher education institution. These candidates have spent time in the industry developing their fundraising skills and learning the terrain. Often, they ramp up to full productivity more quickly than new hires who have no fundraising experience.

Who Makes Up This Population?

Traditional Candidate

- Comes from outside your institution
- Has developed relevant skills and attitudes in comparable positions
- Has major gift fundraising experience

Source: EAB interviews and analysis.

“We Only Look at Experienced Candidates”

Given the shorter learning curve, it’s not surprising that many shops only recruit experienced MGOs. Advancement leaders view these candidates as the least risky hires.

Yet this preference can end up having the unintended consequence of restricting the pool of potential candidates to an extreme degree. Interviewees at one institution related how the expectation that they would only hire someone with years of experience at a peer institution ultimately restricted them to less than 200 people in the country. In such a tight talent market, these demands can be difficult to satisfy.

Advancement Leaders Want to Fill MGO Roles with Trained Individuals

Hitting the Ground Running

“We’ve just launched our biggest campaign ever, and if we’re going to hit the ambitious goals that our Vice President has laid out, then we’re going to have to expand our staff with people who can hit the ground running and start bringing in gifts right away."

Associate Vice President of Advancement
Public Research University

Benefits of Experienced MGOs

- Record of Success
- Refined Skill Set
- Faster Onboarding
- New Strategy Ideas

Source: EAB interviews and analysis.

Compensation Not the Only Factor

To compete effectively in this shallow talent pool, advancement leaders must cater to the needs and wants of job candidates. Increasingly, these include not just a compelling salary, but also opportunities for professional growth and a positive institutional culture.

Even without enhancing salary offers, advancement offices can strengthen their recruiting efforts by highlighting the career paths, unique professional development opportunities, and organizational culture their office provides. Ultimately, these strategies will yield the high-quality, experienced candidates that are the preferred choice of most advancement leaders.

Salary Matters, but Professional Development and Culture Are Also Key

What Fundraisers Look for in a New Position

Compensation and Benefits

47%

Of fundraisers left their last position for a higher salary

Opportunity for Career Advancement

37%

Of fundraisers departed for a more senior role or more growth opportunities

Compatible Culture

36%

Of fundraisers left to escape a negative work environment

"How important were the following factors in your decision to join your current institution?"

EAB 2014 MGO Survey

n=1,217

Ranking	Tuition Reimbursement	Financial Compensation	Professional Development	Office Culture
Very Important	7%	34%	36%	36%
Important	11%	43%	43%	37%
Somewhat important	19%	18%	14%	18%

Source: Burk P, *Donor Centered Leadership*, Chicago: Cygnus Applied Research, 2013; EAB interviews and analysis.

Winning the War for Experienced MGOs

Opportunities abound for advancement offices to improve their recruiting efforts for traditional candidates. Here, we have outlined the five strategies we will profile according to where they fall in the recruiting process.

EAB Research Spotlights Areas for Improvement

Candidate Sourcing	Hiring and Onboarding	Holistic Talent Management
Strategy #1: Systematize Vacancy Planning	**Strategy #3:** Develop Candidate-Centered Recruiting	**Strategy #5:** Unlock Strategic Talent Management
Strategy #2: Move to Proactive Pursuit	**Strategy #4:** Accelerate Acculturation and Productivity	

Strategy #1: Systematize Vacancy Planning

Strategy in Brief

Advancement leaders maintain a formal “star” file of future recruiting targets that they identify from a diverse pool of potential candidates. They ensure that the file stays up to date and is centrally accessible to senior leaders in the event of a vacancy. Current MGOs are assessed periodically to judge their risk of leaving the institution so that administrators can forecast vacancies before they occur.

Problems Addressed

Advancement leaders recruit solely from the pool of individuals who respond to job postings rather than high-potential fundraisers they’ve met in the past. They fail to anticipate vacancies, so candidate sourcing only begins once an MGO announces his or her departure.

Diagnostic Questions

1. Do advancement leaders maintain a list of high-potential candidates to fill future vacancies?

   ___Yes ___No

2. Is this list kept in a central place that is accessible to staff who work on MGO recruiting?

   ___Yes ___No

3. Are one or more staff members tasked with regularly updating this list to record changes in future candidates’ places of employment, position in their organization, and contact information?

   ___Yes ___No

4. Do advancement leaders periodically meet with all MGOs to evaluate their risk of leaving?

   ___Yes ___No

5. Are retention efforts structured in a segmented way that targets MGOs with the highest likelihood of leaving and whose departure would have the biggest impact on the organization?

   ___Yes ___No

Profiled Institutions

University of Michigan

- Institution type: Four-year, public
- Enrollment: 43,700 students (28,300 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Ann Arbor, Michigan)

Massachusetts Institute of Technology

- Institution type: Four-year, private
- Enrollment: 11,300 students (4,500 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Cambridge, Massachusetts)

The Perils of the Informal "Star File"

One of the best ways to recruit experienced talent is to identify prospective candidates long before a vacancy occurs.

To track prospective candidates, many CAOs keep a mental, paper, or digital version of a "star file" document. This document lists a few potential recruits that the CAO would like to turn to in the event of a vacancy.

Ideally, the CAO will keep in touch with these individuals through the occasional meet-up and email. However, these efforts tend to be one-off, haphazard, and inconsistent. More often than not, they fail to connect the individual strongly enough to the institution to convince them to come onboard when an MGO position opens.

Disorganized Approach Results in Lost Leads

CAO receives the résumé of a candidate referred to him by a friend →	"Where can I save this so I can find it later?" →	! No system for storing information
CAO meets an interested applicant, but has no positions open now →	"How can I stay in touch until I have a vacancy?" →	! No strategy for cultivating prospects
Staff member sees a great presenter at a recent conference →	"Who do I tell? Would anyone be interested?" →	! No point person or referral campaign

Source: EAB interviews and analysis.

Build Your Pipeline Now

For star files to contribute to recruiting efforts, CAOs need to approach them more systematically. Successful star file systems share a few key elements. They feature mechanisms for identifying prospective candidates. Candidate information is kept in an accessible database. Administrators who work with these star files strengthen candidate relationships through regular contact. Finally, advancement leaders regularly update the file to ensure it's always ready when they need it.

A robust star file brings with it numerous benefits, including reduced time to hire and increased candidate quality. It also extends the advancement office's recruiting reach, as it helps administrators tap into prospective candidate's networks for even more leads.

Use Comprehensive Star File to Get Ahead of the Next Vacancy

Comprehensive Star File

Key Elements

1

Cast a Wide Net

Tap into the largest possible talent pool through targeted outreach

2

Create a Central Repository

Establish a known central location for résumé storage and updates

3

Cultivate Relationships

Develop engagement plans for candidate updates and communications

4

Systemize Updates

Ensure division staff regularly maintain and monitor "star file" contents

Source: EAB interviews and analysis.

Casting a Wide Net

The first key to a successful star file is casting a wide net when looking for prospective candidates. Advancement leaders should turn to a range of sources to surface high-potential individuals. Successful strategies include asking MGOs to refer former colleagues, hosting networking events, and convening post-conference debrief sessions to gather names.

Generating High-Potential Leads for Your File

Potential Referral Sources

- Current MGOs
- Advancement division staff members
- Former employees
- Senior leaders' personal networks
- University administrators and deans

Collection Methods

- Networking events
- Online research
- Informational interviews
- Post-conference debrief sessions
- Quarterly emails

The Best Talent Spotters

"Without question, we get our best referrals from our staff members. They are the people on the front lines doing the work on a daily basis. So they have a good sense of who might be right for our openings. I am always asking staff members who impressed them at a conference and which colleagues from their old job could fit in here. If you don't ask you miss out on promising leads."

AVP, Development
Private Master's University

Source: EAB interviews and analysis.

Creating a Central Repository

Advancement leaders should also create a central repository for all referrals and leads. Having a reliable location in which to store this information helps ensure that prospective candidates eventually become new hires.

Institutions that do not have the resources to dedicate to a star file CRM can implement a lower-cost solution using readily available software, such as Microsoft Excel. Key fields to track include name, contact information, current employer, title, and referral source. Other optional items to track include best-fit role, current salary, competencies, and contact readiness.

Collect and Store Star File Information in an Accessible Location

Sample Star File

	A	B	C	D	E	F
1	Name	Phone	Email	Current Employer	Current Title	Source
2	Josephine Diaz	617-897-5320	josephinediaz@gmail.com	Fair Lakes Health Cent	Associate Director of Develop	Referral
3	Cassandra Lucas	775-415-9543	clucas@gth.org	Georgetown Hospital	Development Associate	Referral
4	Anthony Pierce	852-603-1598	pieranth@abp.com	Alvarez Brigham Pierc	Director of Development	LinkedIn Search
5	Emmanuel Silver	352-486-8522	emmanualsilver@nmu.edu	Northern Metro Univ	Associate Director of Develop	Conference
6	Aubrey Logan	906-754-8523	aubrey.logan@spc.edu	Southern Pacific Colle	Director of Development	Referral
7	Alex Amador	985-424-6689	aamador@hazelu.edu	Hazel University	Development Associate	LinkedIn Search

Additional Fields to Track

- Best-fit units or positions
- Status of application
- Résumé link
- Contact history
- Comments and notes

Potential Platforms

Excel

icims

Jobvite

FileFinder

BULLHORN

Source: EAB interviews and analysis.

Cultivating Relationships

Once the file is populated with prospects, the next step is to cultivate relationships with those individuals by implementing a carefully designed communication strategy. This strategy can include a range of tactics, such as email announcements or newsletters, periodic coffee meetings, and open invitations to campus.

Treat Prospective Applicants Like Prospective Donors

A Variety of Engagement Tactics

Milestone Announcements

Email prospects when the office achieves a goal or welcomes new leaders

Careers Newsletter

Circulate regular emails highlighting open positions and new-hire testimonials

Open Invitation to Campus

Invite prospective candidates to visit campus any time they are in the area

Six-Month Check-ins

Arrange casual meet-ups or talk via phone to discuss timelines and priorities

Source: EAB interviews and analysis.

Systematizing Updates

Finally, advancement leaders must ensure that the star file is up to date and ready when a vacancy appears. A plan for auditing and updating the star file regularly can help guide staff members' efforts to maintain the resource. It also creates an opportunity for administrators to review the type of information tracked in the database and decide whether some fields should be added or removed.

Ensure Your Star File Is Ready to Use When a Vacancy Hits

Ensuring Accurate and Useful Data

1

Designate a Database Manager

Potential Managers:

- Associate Vice President
- Director of Development
- Chief of Staff
- Director of Recruitment

2

Create a Timeline for Updates

Possible Schedules:

- Monthly
- Quarterly
- Every six months
- Yearly

3

Assess and Revise Information Needs

Suggested Fields:

- LinkedIn profile address
- Conference presentations
- Relevant skills
- Future networking contacts

Source: EAB interviews and analysis.

Reducing the Vacancy Surprise Factor

The comprehensive star file will be most effective when paired with a more proactive approach to vacancy forecasting.

Although the average tenure for MGOs across the industry stands at approximately two years, CAOs often find themselves surprised by departures. The resulting vacancies create emergency situations as advancement leaders scramble to fill them as quickly as possible.

MIT has taken a more proactive approach to assessing departure likelihood. The division's talent management staff meets regularly with managers to assess the flight risk of individual MGOs.

To evaluate risk, staff consider factors like compensation, likelihood of recruitment elsewhere, sense of autonomy, and commitment to the organization. MIT is looking to build a simple tracking tool, probably in Excel, that will monitor and assess each individual's likelihood to depart, particularly staff in the sensitive 18- to 24-month tenure window.

MIT Resource Development Proactively Forecasts Vacancies

Meet to Identify Staff

Strategic talent management (STM) staff meet regularly with managers to assess the flight risk of individual performers; special attention is given to MGO staff after 18 to 24 months of tenure

Evaluate Risks

Group evaluates candidates on key risk factors including:

- Compensation
- Sense of commitment to the institution
- Family or other community attachments
- Likelihood of being recruited
- Desire to retain them

Track Assessments

Goal is to build transition risk into forthcoming annual talent review process; staff will track assessment in a simple tracking tool maintained by STM staff

Source: EAB interviews and analysis.

Going a Step Further

Institutions that would like to take a detailed approach to vacancy forecasting should consult the toolkit resources in the back of this publication. In particular, the employee retention risk assessment excerpted here will direct advancement leaders' attention to the factors that have the greatest impact on an MGO's decision to leave.

More Formal Risk Assessments for MGO Talent

Employee Retention Risk Assessment

Employee Name: _____ Age: ___ Department: _______ Manager: ________

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 8 months or has indicated s/he has been contacted by a recruiter.			
Relationships			
The employee does not communicate openly with his/her direct supervisor.			

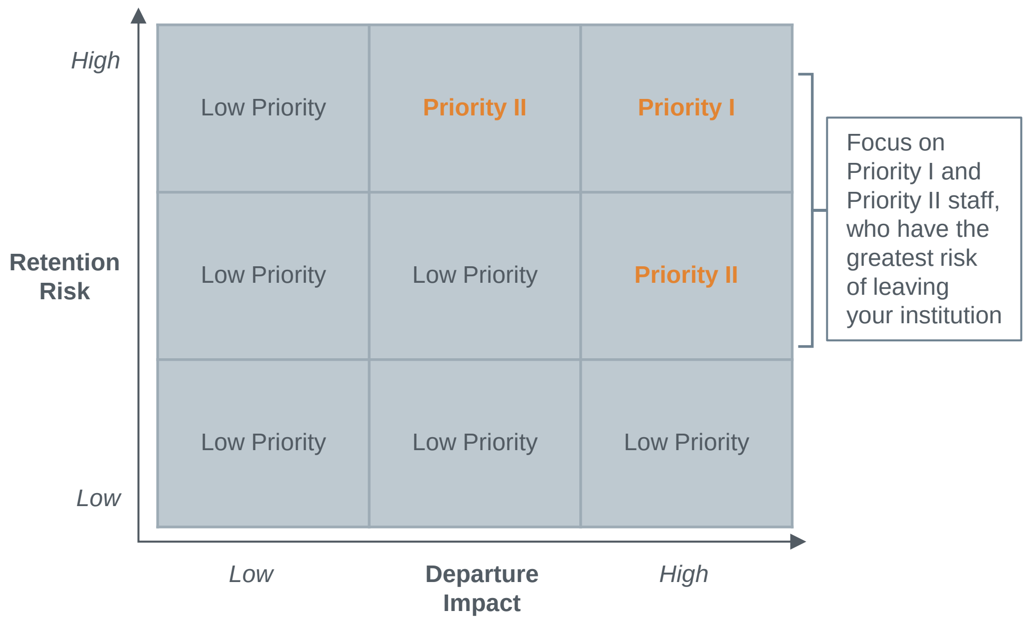
Source: EAB interviews and analysis.

Allocate Resources for the Greatest Impact

Once advancement leaders assess the likelihood of an MGO's departure, they should prioritize their retention efforts according to which departures would have the most negative consequences for their institution. Exercises like this prioritization matrix can reduce the surprise factor around vacancies, empower advancement leaders to backfill positions sooner, and ultimately ease MGO staffing transitions.

Identify Where to Focus Retention Efforts

Employee Prioritization Matrix



Source: HR Advancement Center: *Navigating Looming Mass Retirements for Frontline Staff*, Washington, DC: The Advisory Board Company, 2014; EAB interviews and analysis.

Strategy #2: Move to Proactive Pursuit

Strategy in Brief

Recruiting efforts shift from static job boards to dynamic, network-driven social media. Advancement leaders use digital tools such as LinkedIn to surface and cultivate candidates who would not have otherwise applied. Remote MGO roles expand recruiters' geographical reach.

Problems Addressed

Traditional recruiting practices rely on passive postings on job boards. They miss candidates who are not on the right platform at the right time and who are not actively searching for a new job. Rather than proactively identifying qualified candidates, advancement leaders rely on them to self-identify. They limit their candidate pool to those individuals who would be willing to relocate into the area.

Diagnostic Questions

1. Do advancement recruiters look beyond online job boards to fill vacancies?

   ___Yes ___No

2. Do social media channels figure prominently in advancement recruiting efforts?

   ___Yes ___No

3. Are LinkedIn's advanced search features used to surface qualified candidates?

   ___Yes ___No

4. Do advancement leaders cultivate qualified candidates they find through social media before MGO positions open up?

   ___Yes ___No

5. Are MGO vacancies regularly advertised as remote positions to attract a broader base of candidates?

   ___Yes ___No

Profiled Institutions

National Public Radio
- Organization type: Nonprofit
- Employees: 700

Accenture
- Organization type: For profit
- Employees: 305,000

California Institute of Technology
- Institution type: Four-year, private
- Enrollment: 2,200 students (1,000 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Pasadena, California)

Missouri University of Science and Technology
- Institution type: Four-year, public
- Enrollment: 8,100 students (6,100 undergraduates)
- Carnegie classification: Research university (high research activity)
- Campus setting: Remote town (Rolla, Missouri)

Breaking the “Post and Pray” Habit

When hiring an MGO, advancement leaders tend to “post and pray.” After uploading a position description to a digital job board, they will wait passively for candidates to come to them. Often, their wait is in vain. Few candidates respond to the posting, and those who do are unqualified to fill the role.

The most successful recruiters refuse to wait for divine intervention to place the perfect candidate in their applicant pool. Instead, they employ a variety of proactive strategies to connect with candidates and take more control over the recruiting pipeline.

Divine Intervention Is an Unsustainable Recruiting Strategy

What Is “Post and Pray?”

- Vacancy opens
- AVP posts a job description on local job board websites and national job search engines
- Institution waits and “prays” that great applications will roll in

? **Will a qualified candidate apply?**

How “Post and Pray” Is Costing You

- ✖ Misses candidates who aren’t on the right platform at the right time
- ✖ Misses the half of candidates who aren’t actively seeking a new job
- ✖ Generates a high volume of low-quality, poorly matched applicants
- ✖ Leads to extended or failed searches, wasting time and resources

Source: EAB interviews and analysis.

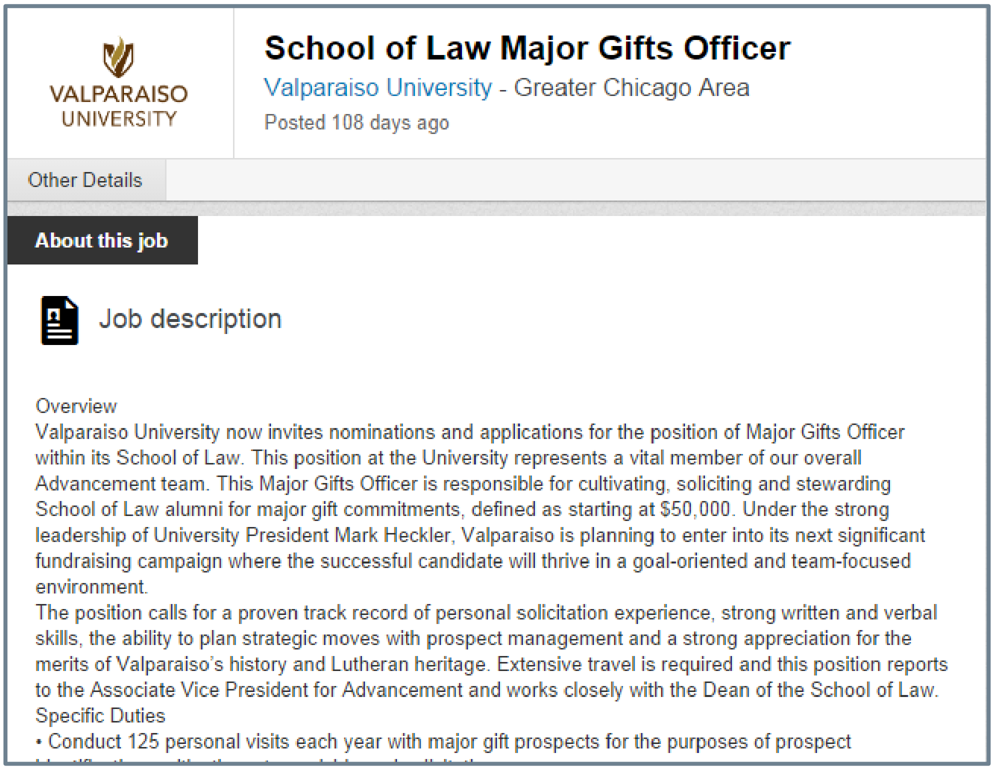
Social Media Can Extend Your Reach

Social media presents a great opportunity for advancement leaders to expand their recruiting reach. Although many organizations have social media accounts these days, few incorporate those accounts into their broader recruiting strategy. When they do, it's in a haphazard fashion, with lengthy job postings cut directly from HR websites failing to capture candidates' attention.

But Missed Opportunities Abound

92%	14,464	3,414
Of companies indicate they use social media recruiting	LinkedIn profiles with the title "Major Gift Officer"	North American-based fundraiser jobs on LinkedIn in June 2014

Status Quo Post Fails to Engage



VALPARAISO UNIVERSITY

School of Law Major Gifts Officer

Valparaiso University - Greater Chicago Area

Posted 108 days ago

Other Details

About this job

Job description

Overview

Valparaiso University now invites nominations and applications for the position of Major Gifts Officer within its School of Law. This position at the University represents a vital member of our overall Advancement team. This Major Gifts Officer is responsible for cultivating, soliciting and stewarding School of Law alumni for major gift commitments, defined as starting at $50,000. Under the strong leadership of University President Mark Heckler, Valparaiso is planning to enter into its next significant fundraising campaign where the successful candidate will thrive in a goal-oriented and team-focused environment.

The position calls for a proven track record of personal solicitation experience, strong written and verbal skills, the ability to plan strategic moves with prospect management and a strong appreciation for the merits of Valparaiso's history and Lutheran heritage. Extensive travel is required and this position reports to the Associate Vice President for Advancement and works closely with the Dean of the School of Law.

Specific Duties

• Conduct 125 personal visits each year with major gift prospects for the purposes of prospect

IMAGE CREDIT: LINKEDIN.COM

Missed Opportunities Abound

- Difficult to capture job seeker mindshare due to activity and noise
- Fails to reach candidates who are semi-interested or passive candidates
- Challenging to penetrate diverse talent pools

Source: Bennett, S. *Company Use of Social Media for Recruitment.* 2013, http://www.mediabistro.com/alltwitter/social-media-recruiting_b50575; EAB interviews and analysis.

Tapping into Personal Networks

An employee social media recruiting campaign can bring coordination to these scattershot efforts. National Public Radio (NPR) recently launched one of these campaigns on Twitter and Instagram.

They encouraged all employees to tweet job posts (limited to 140 characters) to their personal and professional networks. Staff members were also asked to share pictures of life at NPR on Instagram to give candidates insight into the company, its employees, and the organizational culture.

NPR dedicated hashtags and Twitter handles specifically to this initiative. Their efforts paid off. Not only did NPR get a tremendous amount of support from staff, but they also saw significant savings on marketing costs—around $100,000 per year.

Developing an Employee Social Media Recruiting Campaign

Program Highlights

- NPR employees encouraged to tweet job posts to their personal and professional networks
- New hashtags and hiring-specific handles developed for the initiative
- NPR staff leveraged as brand ambassadors to help attract new talent to the organization

Results

- 10,000 tweets and 2,500 Instagram posts from current NPR staff members
- Twitter handle @NPRjobs became one of their top sources of hiring
- Decreased marketing expenditures, including $100,000 a year savings in job board postings

Source: Halzack S, "For Nonprofit NPR, Social Media is a 'Great Equalizer' When it Comes to Hiring," *The Washington Post*, January 7, 2013, http://www.washingtonpost.com/business/capitalbusiness/for-nonprofit-npr-social-media-is-a-great-equalizer-when-it-comes-to-hiring/2013/01/04/a366b9ac-550b-11e2-bf3e-76c0a789346f_story.html; EAB interviews and analysis.

Taking Referrals to the Next Level

Some for-profit organizations have gone even further by asking company alumni to help identify potential candidates. For example, Accenture built a robust alumni network to maintain engagement and build another pipeline of referrals.

Launched in 2001, the Accenture Alumni Network features an online portal that alumni can connect to via their social media accounts and send referrals back to their former employer. Accenture sees their alumni as high-priority recruiting resources. Those who successfully refer a candidate are eligible for a reward of up to $7,000.

Accenture Leverages Company Alumni in Online Referral Campaigns

Alumni can connect via social media

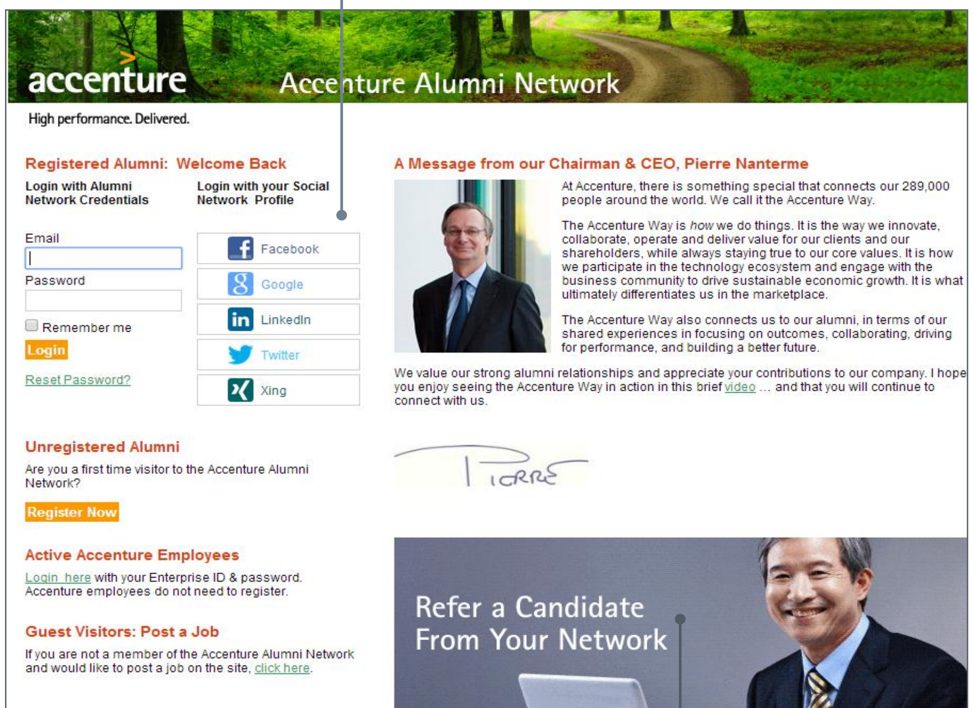


IMAGE CREDIT: ACCENTUREALUMNI.COM

Alumni referral link prominently featured

33%	1 in 5
Of all candidates come to Accenture through alumni referrals	Referred candidates are eventually hired

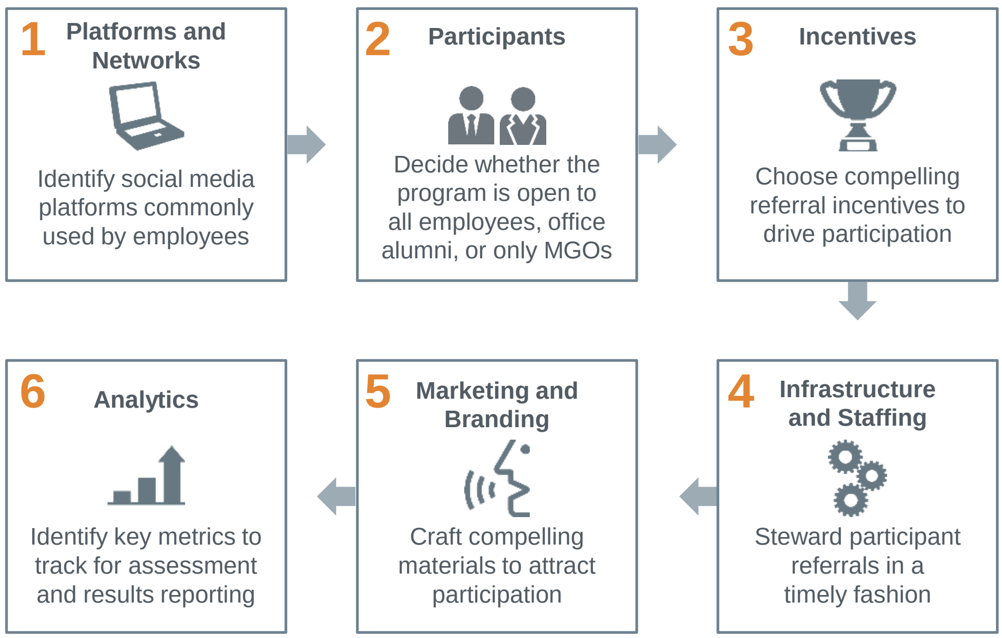
Source: Referral Recruitment, "Accenture's Best Practice Referral Recruitment", http://www.referralrecruitment.com/home/accenture; EAB interviews and analysis

Navigating to Success

Institutions interested in trying social media sourcing should consider a few key questions first. Who will be eligible to participate? How will you incentivize participants? Who will be responsible for referral follow-up and communication?

Implementing Social Media Referrals at Your Institution

Key Steps for Social Media Referral Campaigns



Source: EAB interviews and analysis.

Tapping into the Hidden Market

Social media can also be a great way to cultivate relationships with passive candidates who are not currently seeking a new position. At Caltech, a dedicated advancement recruiter uses LinkedIn to create a long-term pipeline of prospective applicants.

Using a premium LinkedIn account, the recruiter conducts targeted searches for specific key words, titles, employers, and lengths of tenure. She then identifies and connects with high-potential individuals. Rather than attempting to recruit them immediately, she frames her initial approach as “getting to know each other.”

Caltech has seen great success with this strategy. Over the past year, LinkedIn candidates accounted for nearly a quarter of their hires at the director level and above. Overall, they have saved time and money by building a pipeline of candidates who are a good fit for the institution.

Caltech Uses LinkedIn to Cultivate Passive Candidates

Main Data Points:

- Current title and tenure
- Employer
- Keywords

Primary Tactics:

- Personal approach
- Milestone announcements
- Campaign updates

Foundation of Our Strategy

“I’d have to estimate that we used LinkedIn for almost all of our searches, in one way or another.”

Katrina Onderdonk
Talent Acquisition Manager
California Institute of Technology

22%

Of hires at Director level or above in 2013-2014 were sourced through LinkedIn

Source: EAB interviews and analysis.

Interested in LinkedIn Premium?

Institutions interested in implementing Caltech's approach will need an upgraded account on LinkedIn. The website offers several account types that feature various benefits and costs.

An Overview of Accounts, Resources, and Costs

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				✔

Source: LinkedIn, http://www.linkedin.com; EAB interviews and analysis.

Combatting the Geographical Disadvantage

Many CAOs find that the location of their institution plays a huge role in recruiting experienced fundraisers, often limiting their candidate pools. At Missouri University of Science and Technology (Missouri S&T), recent searches for a campus-based MGO position resulted in low-quality candidate pools—including applications from morticians, a night manager from the Holiday Inn, and a veterinarian.

Missouri S&T tackled this challenge by developing remote MGO roles. When the office reposted the role as a remote position, the overall size and quality of the candidate pool improved dramatically.

Missouri University of Science and Technology's Remote MGOs

Recruiting Struggles for Rural Campuses

"People know and like our university, but it's really hard for families to move here."

"Even with a salary bump, qualified MGOs don't want to move to our small town."

"I can't meet the philanthropic goals of the university if I require everyone to be on campus."

Traditional Postings Unfruitful…

"I recently posted an MGO position as on-campus and the quality of candidates was terrible. I got morticians, I got night managers from the Holiday Inn…I got a veterinarian."

…But Remote Positions Attract Talent

"After reposting it as a remote position, suddenly I had wonderful applicants, wonderful! Three to four years of experience, Master's degrees, several with 10+ years that had their CFREs. It was unbelievable."

Lea-Ann Morton
Assistant Vice Chancellor for Advancement
Missouri University of Science and Technology

Source: EAB interviews and analysis.

Expanding the Pool of Qualified Applicants

Missouri S&T currently has four remote MGO positions, all of which are located within four hours of campus. Rather than working out of a satellite office, these individuals work from their homes, have the same goals as on-campus officers, and are required to visit campus once a month.

Interviewees at Missouri S&T cited numerous benefits of this strategy, including an expanded applicant pool and the ability to offer more donor events in urban areas.

Meeting Top Candidates Where They Are

Missouri University of Science and Technology Pilots Remote MGO Positions

Four current remote positions	Work from home
One required visit to campus per month	Same goals as on-campus officers

Remote MGO Position Benefits

- Expanded applicant pool with higher-quality candidates
- Increased institutional reach with select donor bases
- Ability to offer more donor events in urban areas
- Reduced travel necessary for on-campus staff

Source: EAB interviews and analysis.

Addressing Potential Barriers for Remote MGOs

Missouri S&T has put a considerable amount of time and thought into successfully implementing this practice. In particular, they focused on developing a comprehensive onboarding program to orient new MGOs, build their engagement to the office, and introduce them to relevant campus partners.

Missouri S&T's Onboarding Focuses on Acculturation

Key Implementation Questions

"What are the best ways to establish oversight and communication channels with remote workers?"

"Will the cost savings and added benefits of this arrangement outweigh the resources involved in maintaining it?"

"How will we develop a team mentality and instill workplace culture in remote workers?"

"What is the best way to onboard and orient remote MGOs?"

Comprehensive Onboarding Program

- Five days of on-campus orientation for remote MGOs
- Individual face-to-face time with senior leaders and other key campus partners
- Informal team building sessions
- Visits to places of interest on campus

Missouri University of Science and Technology
Joe Miner Itinerary
February 4-8, 2013

8:30 a.m.	Group HR Orientation for all new hires
9:30 a.m.	Introduction to Prospect Research team
10:30 a.m.	Meet with Chairman of hiring department
12:30 p.m.	Lunch with Development Team
2:30 p.m.	Tour of Career Opportunities & Employer Relations
4:30 p.m.	Tour of the Solar Village

Source: EAB interviews and analysis.

Making It Work on Your Campus

Institutions interested in trying out remote MGOs should anticipate potential challenges and take steps to mitigate them.

For example, interviewees at Missouri S&T pointed out that communication and engagement can be more challenging with remote employees. Offices that have remote MGOs will need to design intentional communication channels to keep fundraisers engaged.

EAB Recommendations for Implementing Remote MGOs

Key Steps		Launching a Successful Remote MGO Arrangement
Strategic Placements	✔	Consider areas where you already have strong donor bases or want to expand your strategy in the future
	✔	Focus on urban centers within reasonable driving distance
Team Building	✔	Incorporate activities that introduce your institutional culture and solidify a team mentality
Intentional Communication	✔	Follow up to ensure that key communications were received
	✔	Build opportunities to strengthen cultural bonds and acknowledge your appreciation of their work

Source: EAB interviews and analysis.

Winning the War for Experienced MGOs

The recruiting process does not end once the candidate submits an application. Advancement offices should extend their efforts at building candidate engagement into the hiring and onboarding process by wooing candidates away from competing offers and getting them to full productivity faster.

EAB Research Spotlights Areas for Improvement

Candidate Sourcing	Hiring and Onboarding	Holistic Talent Management
Strategy #1: Systematize Vacancy Planning	**Strategy #3:** Develop Candidate-Centered Recruiting	**Strategy #5:** Unlock Strategic Talent Management
Strategy #2: Move to Proactive Pursuit	**Strategy #4:** Accelerate Acculturation and Productivity	

Strategy #3: Develop Candidate-Centered Recruiting

Strategy in Brief

Advancement leaders communicate interview schedules to candidates and assign areas of questioning to interviewers in advance of the interview day. A candidate concierge highlights for the candidate the benefits of working for the institution, and the advancement website calls attention to professional development initiatives underway in the division. During interviews, interviewers go over MGO performance metrics to test cultural fit.

Problems Addressed

Candidates who arrive on campus for interviews go through a disorganized and opaque process. They are subjected to redundant lines of questioning, and they receive little insight into the culture of the institution for which they might soon work. They learn little of the community until they accept a job offer and relocate. Potential candidates who explore the institution's website find minimal information about professional development initiatives and the advancement division's culture.

Diagnostic Questions

1. Do candidates receive an email before coming to campus that details the interview schedule?

   ___Yes ___No

2. Are interviewers assigned competencies to test candidates on?

   ___Yes ___No

3. Does a dedicated staff member show the candidate around and highlight the benefits of working for the institution?

   ___Yes ___No

4. Is information about professional development initiatives profiled on the advancement website?

   ___Yes ___No

5. Do candidates receive information about performance metrics during the interview?

   ___Yes ___No

Profiled Institutions

Iowa State University Foundation

- Institution type: Four-year, public
- Enrollment: 33,000 students (27,700 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Small city (Ames, Iowa)

Massachusetts Institute of Technology

- Institution type: Four-year, private
- Enrollment: 11,300 students (4,500 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Cambridge, Massachusetts)

Profiled Institutions (cont.)

Stephen F. Austin State University

- Institution type: Four-year, public
- Enrollment: 12,800 students (11,000 undergraduates)
- Carnegie classification: Master's colleges and universities (larger programs)
- Campus setting: Rural fringe (Nacogdoches, Texas)

Pennsylvania State University

- Institution type: Four-year, public
- Enrollment: 46,600 students (40,100 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Small city (State College, Pennsylvania)

University of Michigan

- Institution type: Four-year, public
- Enrollment: 43,700 students (28,300 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Ann Arbor, Michigan)

University of California, Los Angeles

- Institution type: Four-year, public
- Enrollment: 40,800 students (28,700 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Large city (Los Angeles, California)

University of California, Davis

- Institution type: Four-year, public
- Enrollment: 33,300 students (26,500 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Small suburb (Davis, California)

DePaul University

- Institution type: Four-year, private
- Enrollment: 24,400 students (16,400 undergraduates)
- Carnegie classification: Doctoral/research universities
- Campus setting: Large city (Chicago, Illinois)

Starting Off on the Wrong Foot

Because the war for talent is so fierce, advancement shops cannot stop wooing candidates once they apply. Candidate engagement must continue throughout the interview process to convince high-potential fundraisers to come on board.

However, far too many CAOs forget that interviewing is still recruiting. They focus the interview process solely on the institution's needs, rather than the candidate's. In addition, the process is often disorganized, leaving candidates with a negative impression of the organization. The experience can end up alienating the institution's most promising candidates.

Disorganized Search Process Leaves the Wrong Impression

A Make or Break Moment

90%
Of candidates would encourage others to apply after a courteous interview

78%
Of candidates would talk about a bad interview with friends and family

64%
Of candidates share their experience of a company on social media

Typical Campus Visit Issues

Coordination Issues
Interviewers often operate independently, resulting in a disorganized experience

Communication Gaps
Interviewers fail to communicate basic information about the campus visit, the institution, and the region

Failure to Woo Candidates
Interviewers focus exclusively on institutional needs, failing to sell the candidate on the institution and the local community

Source: Sheth R., "The Candidate Experience: It Can Make or Break Your Employer," *The Business of HR*, 2013, http://www.tlnt.com/2013/07/23/the-candidate-experience-it-can-make-or-break-your-employer-brand/; EAB interviews and analysis.

Putting Your Best Foot Forward

To avoid negative outcomes, CAOs should ensure that their interview process incorporates two key elements.

First, the interview should be as streamlined as possible. Unnecessary meetings and redundant assessments should be eliminated. Second, advancement leaders should build in opportunities to woo the candidate by selling the institution and local community.

Two Key Elements for Improving the Candidate Experience

Status Quo Approach	Key Element #1: Streamline the Interview Process	Key Element #2: Sell the Institution and Community
▪ Campus visit experience is confusing and frustrating for candidate ▪ Individual never sees what makes the institution special	▪ Coordinate interview questions and topics ▪ Minimize repetition ▪ Reduce communication gaps	▪ Explore candidate's needs and interests ▪ Maximize depth and quality of interactions ▪ Highlight positive features of the university and region

Source: EAB interviews and analysis.

Making Planning and Logistics Simple

Interview processes can be streamlined by equipping both the candidate and the hiring committee with information essential to their success.

As a first step, advancement leaders should prepare the candidate for his or her campus visit by sending a pre-wire email several days before the trip. Ideally, the email will be as detailed as possible. It should include hotel information, transportation arrangements, and a detailed itinerary of scheduled meetings. It may also mention nearby restaurants, unique landmarks, shopping recommendations, and community points of interest.

Pre-wire Email Communicates Essential Information

Sample Email Sent to Candidates

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.

Tuesday, July 1st

- 8:30 a.m. - United Airlines Flight 443, JFK-LAX
- 11:30 a.m. - Pick up Avis Rental Car at LAX. Reservation No. 7826
- 1 p.m. - Check in at Irvine Marriott. Reservation No. 651
- 6:30 p.m. - Dinner reservations at Ambar with AVP for Development

Wednesday, July 2nd

- 8 a.m. - Interviews with advancement team, Leonox Hall
- 12 noon - Lunch with VP for Advancement
- 1:30 p.m. - Depart for airport, returning car to Avis counter
- 4:15 p.m. - United Airlines Flight 233, LAX-JFK

Kind regards,

AVP for Development, Hazel University

To add a personal touch, include links for:

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

Source: Croteau JD, *The People First Approach*, Washington, DC: Council for the Advancement of Education, 2009; EAB interviews and analysis.

Getting Everyone on the Same Page

Hiring committees also benefit from advance preparation. Yet too many interviewers fail to coordinate before the candidate arrives. They usually gather their own information about the candidate, choose their focus areas, and create their own question list.

This lack of coordination can create an unpleasant experience for the candidate. Interviewers end up asking redundant questions, providing inconsistent answers to candidate inquiries, and focusing on less critical areas of a candidate's background. These blunders create an impression that the interview team lacks professionalism or interest in the candidate.

The Iowa State University Foundation has tackled this problem by developing a pre-interview briefing for everyone who will meet with the candidate. Working with the hiring manager, the AVP of HR and Governance sends the email in the morning prior to interview day. In this email, he lists the interview schedule, attaches the candidate's résumé, suggests particular areas to focus on, and includes the feedback form.

Iowa State University Foundation's Pre-interview Briefings

Email Prepared By:

- AVP, HR, and Governance
- Hiring Manager

Briefing Contents

- Interview schedule
- Candidate résumé
- Open-ended question suggestions
- Areas for interviewer follow-up
- Candidate feedback form

Interview Team

- Current MGOs
- Foundation staff
- Academic dean

Source: EAB interviews and analysis.

A Better Process for Busy People

The Foundation's pre-interview briefings have yielded benefits for the institution, interviewers, and candidates.

In particular, interviewers appreciate the consistent flow of information and the AVP's recommended focus areas for each candidate, which help to reduce the amount of time needed to prepare for conversations.

Email Briefings Help Guide and Streamline Interviews

Institution Benefits

"We're getting much better feedback now from interviewers. They think more strategically about what they're asking and listening for. Before, the feedback was more ambiguous. But now, we're much more picky. We're being strategic and finding the right fit.

→ ✔ Focused assessment of candidates leads to better hires and faster onboarding

Interviewer Benefits

"These people are busy, and it takes a lot of time to sit down for three interviews—that's three hours out of their week, and so we want to make sure that we're being strategic with their time.

→ ✔ Smarter use of time for leaders and fundraisers on interview team

Candidate Benefits

"My goal is for candidates to come out of the day-long interview still excited about the job, still excited about the process, and feeling like they really understand the ISU Foundation and know what they would be coming into if they were offered the job.

→ ✔ Better impression of the institution and exciting interview experience

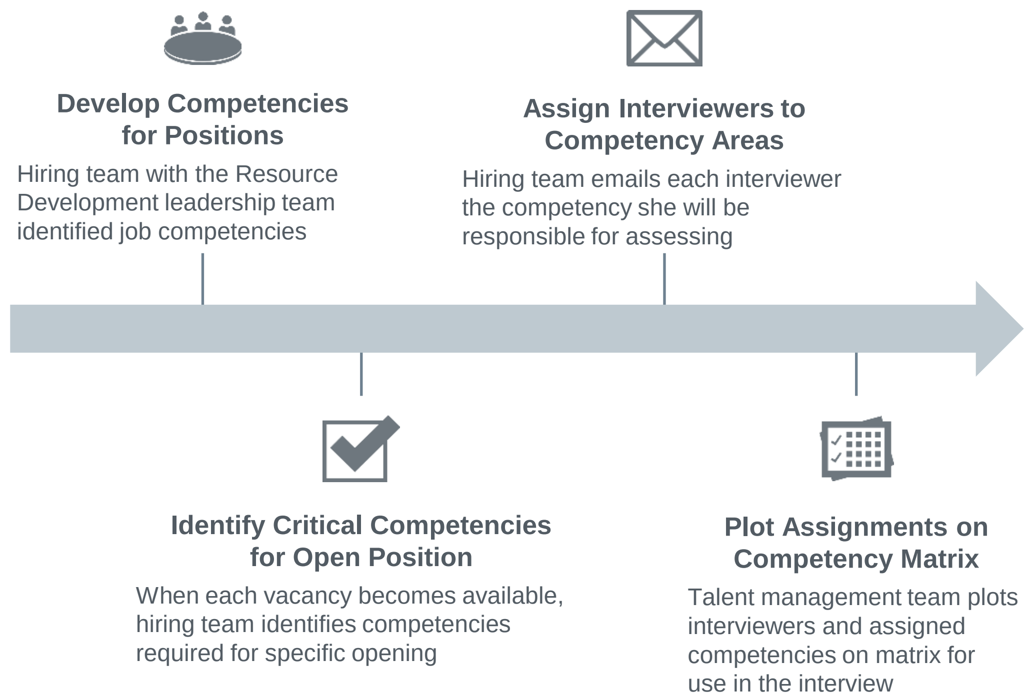
Source: EAB interviews and analysis.

Redesigning the Interview Process

Advancement offices can expand upon this strategy by assigning specific roles to each interviewer across the day.

This is the approach that MIT has taken. When interviewing candidates, the hiring team at MIT identifies the competencies required for each specific position. Each competency in the list is assigned to one interviewer to focus on during conversations. The hiring team notifies the interviewer of his or her assignment via email at least 24 hours in advance.

MIT Resource Development's Competency-Based Approach



Source: EAB interviews and analysis.

The Competency Matrix

The hiring team plots all competencies on a matrix and sends the form to interview participants before the candidate's visit. Interviewers use the matrix as a feedback form for assessing candidates that they pass along to the hiring manager. The form incorporates both Likert scales and space for open-ended notes. Interviewers must complete the section for their competency within 24 hours of the interview.

A Snapshot of MIT's Tool

Each interviewer is assigned a primary competency to assess

	Competency: Negotiating	Competency: Communication	Competency: Leadership
Interviewer A	1 2 3 4 n/a	1 2 3 4 n/a	1 2 3 4 n/a
Interviewer B	1 2 3 4 n/a	1 2 3 4 n/a	1 2 3 4 n/a
Interviewer C	1 2 3 4 n/a	1 2 3 4 n/a	1 2 3 4 n/a

Interviewers rate the candidate's response to the competency-related questions on a Likert scale and have space for notes

Source: EAB interviews and analysis.

Asking the Right Questions

To plan their conversations, interviewers can access a question bank that maps to each competency. Competencies, which range from conflict management to risk taking, account for the varied skills necessary in the MGO role. The associated questions solicit concrete examples that illustrate the candidate's mastery of a given skill set.

Interviewers Supported by a Competency-Based Question Library

Competencies

- Accountability
- Attention to detail
- Communication/influence
- Conflict management
- Cultural sensitivity
- Initiative
- Motivation
- Negotiating/selling
- Planning and organizing
- Risk taking

Question Bank: Communication/Influence

- Describe a challenging time when others relied on you to interpret information or a message for them.
- 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.

Source: EAB interviews and analysis.

"A Win-Win"

MIT's competency-based question library has enhanced the interview process for candidates as well as the institution. The candidate gains a better understanding of the position and can make a better case for why he or she is a good fit, while the institution uses interviewers' time more strategically and receives more actionable feedback.

Benefits for the Candidate and the Institution

Candidate Benefits

- Gains information about key competencies for the position
- Has opportunity to share a range of experiences and success stories
- Answers fewer duplicative questions during the campus visit

Institution Benefits

- Ensures interviewer time is spent evaluating critical areas for role success
- Reduces prep time for individual interviewers
- Makes sure that interviews yield actionable information for the hiring team

Honest, Two-Way Communication

"We want to make the interview process an easy lift for the interviewers. This having been said, we want to ensure that the dialogue between the interviewer and the candidate is of value for both parties. Thoughtful questions asked in a planned, structured interview provide both the interviewer and the candidate a wealth of information about one another."

Jim Montague
Executive Director, Human Resources & Strategic Talent Management
Massachusetts Institute of Technology

Source: EAB interviews and analysis.

Reference Checks on Autopilot

In an effort to further optimize the interview process and surface best-fit candidates, many advancement leaders are rethinking their approach to reference checks.

All too often, hiring managers put little thought or effort into reference checks. They view them as tasks that should be completed as quickly as possible before extending an offer, even if it means overlooking vitally important information.

Typically, the candidate is asked for a list of past and current supervisors, peers, and colleagues. Calls are usually made to a few individuals on the list, and the conversations focus on verifying information shared by the candidate during the interview process. In many cases, the hiring manager has already made up his mind about whether to hire the candidate before the conversation, and very little said during the reference check will change that.

Current Process Rarely Yields Valuable Intel

Checking the Box

"Reference checks tend to be that last thing I do in the interview process. By that time I'm pretty sure I'm going to hire this person anyway. We've all met them, we've all spoken with them for an hour, and I trust our judgment. So I don't see the point in throwing a lot of time into it at that point."

Chief Advancement Officer
Private Research University

Why Didn't They Tell Me?

"A while back, we hired this fundraiser. We all liked him and his references all checked out. But he turned out to have huge performance issue. It was so obvious that anyone would have noticed it immediately. And I thought… 'Why didn't anyone tell me this during the reference checks?'"

AVP of Advancement
Public Research University

Source: EAB interviews and analysis.

Reference Checks 2.0

This status quo approach to reference checks deprives advancement leaders of key intel they need to make smart hiring decisions. As a result, many innovative institutions have recently revamped their reference questions. Rather than adopt a narrow focus on job content, responsibilities, and verification, they instead integrate questions about skills, communication styles, professional challenges, and areas for development.

For example, some advancement leaders ask references to rate candidates from one to 10 on various competency areas. Then, for very high or low scores, they ask follow-up questions to uncover why the respondent felt that way. Others focus on just a few areas and set specific goals for each conversation, rather than asking every contact the same questions.

Overall, these pioneer institutions are recasting the reference check as an invaluable tool for testing candidate fit and quality, as well as for gathering information that will help shape the onboarding process for that individual.

Testing Fit, Surfacing Red Flags, and Thinking About Onboarding

From "Check the Box" Questions…

- Did your division employ this person from 2011 to 2013?
- Can you describe her duties as an MGO?
- Were there any issues you are aware of that impacted her job performance?
- Is there anything I haven't asked that you wish to share with me?

…To Action-Oriented Conversations

- 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?
- What area could this individual continue to grow in?
- What does this candidate need to do her best work?

Asking the Right Questions

"References are tricky. We have developed some good reference questions. It is important not to just ask what they are good at, but also what their areas of growth are. We try to ask probing questions about the candidate's communication style, how they learn, etc. The answers to these questions come in handy later, when it's time to onboard that person."

Talent Management Professional
Public Research University

Source: EAB interviews and analysis.

Off-List References

Despite some of the new approaches, many advancement leaders remain skeptical of reference checks. Some have even turned to off-list reference checks to supplement what they can learn from the candidate's personal reference list.

Hiring managers resort to off-list references more frequently than they admit. However, considerable disagreement exists among advancement leaders about whether or not off-list references should be deployed in MGO searches. In addition to ethical considerations, off-list references raise a variety of legal issues, particularly around confidentiality.

Advancement leaders who want to implement off-list references should consider reserving the strategy only for serious candidates. They should increase transparency by seeking the candidate's permission first.

Potentially Valuable but Potentially Risky

Potential Drawbacks	Potential Benefits
Confidentiality concerns	Avoiding minefield candidates
Legal issues	Feedback from trusted colleagues
Ethical considerations	Preventing costly bad hires

Seek Permission First

"I don't know that we'd ever put off-list references into official practice here. There's just too many legal concerns for us. I think it's fine if you call the candidate and ask for another reference or ask if it's OK if you reach out to some other folks."

Talent Management Professional
Public Research University

Source: EAB interviews and analysis.

Why We Need to Woo Better

In addition to streamlining interviewing, advancement offices should also use the interview process as an opportunity to woo candidates—that is, to build their engagement with the university and local community.

Advancement leaders who focus too much on vetting candidates can lose sight of the fact that the candidate is also vetting them. In fact, some experts argue that CAOs need to treat prospective employees as they would prospective donors, cultivating strong relationships and responding to their needs.

Status Quo Campus Visits Leave Candidates Cold

Candidate Interests and Concerns

- Campus is nice, but do I really want to live in this town?
- Uprooting my family is a big decision. What are the local schools like?
- Who would be my coworkers and what is the office culture like?
- How is this school different from the other two institutions making me an offer?

A Delicate Balance

"Recruitment is a delicate balance, a dance if you will, between assessment and selling. You need to be able to assess a candidate for fit and ability and competency, while at the same time ensuring that he gets a good, accurate sense of the division or department and the institution. As much as you are assessing the candidate, you need to allow him to assess you and your institution."

Jon Derek Croteau
Author
The People First Approach

Source: Croteau JD, *The People First Approach*. Washington, D.C.: Council for the Support and Advancement of Education, 2009; EAB interviews and analysis.

A Two-Way Process

Recognizing this, innovative institutions have assigned a staff member to act as a point of contact and facilitate information flow between the candidate and the institution.

An example of this "candidate concierge" can be found at Stephen F. Austin State University (SFASU), which faces recruiting challenges due to its location in rural Nacogdoches, Texas. SFASU's candidate concierge learns about each candidate's interests and needs by asking questions during phone screenings, exchanging emails, and looking up the candidate's social media profiles.

She then shares details about life at Stephen F. Austin and in Nacogdoches based on the candidate's background. For example, if she learns that the candidate has children, the concierge may mention that their town has one of the top-ranked day care systems in the state and a laboratory school for older children.

Stephen F. Austin State University's Focus on Wooing Candidates

Candidate Concierge Logistics

- Candidate concierge is a dedicated staff person on the development team
- Time invested is approximately three to four hours per week prior to the campus visit

Step #1:
Gather Information About Candidate Interests

- Candidate concierge joins phone screens with applicants to get an early sense of their interests
- Concierge reviews the candidate's résumé and social media profiles to get to know the candidate better

Step #2:
Frontload Information Sharing

- Concierge provides the candidate a pre-wire email of local attractions
- Interview itinerary is developed to include leisure or athletic activities that the candidate enjoys
- Concierge gives the candidate a tour of town

Source: EAB interviews and analysis.

Making It Feel Personal

Before candidates visit campus, the candidate concierge emails them customized itineraries that feature interviews and activities aligned to their interests. Depending on the individual, she may include a trip to a sports event, a special meet and greet, or an appointment with a local realtor.

Once candidates arrive on campus, the concierge greets them and serves as their guide across the day.

Concierge Builds Custom Experiences into Campus Visit

Erica A. Bantam
Candidate for Major Gift Fundraiser

- Currently living in Houston, TX
- Employed at the University of Houston
- Ran the Houston Marathon this year
- Interested in building a home
- Holds a B.A. and M.A. in Philosophy from University of Texas at Austin

Visit Customized to Personal Interests

Sample On-Campus Interview Itinerary

7:30 a.m. – Jogging with current MGO and Athletics Department Trainer

10:00 a.m. – Interview with Dean of Humanities

11:00 a.m. – Campus tour

12:00 p.m. – Lunch interview with AVP of Development

2:00 p.m. – Interview with VP of Advancement

3:00 p.m. – Tour of Nacogdoches

4:00 p.m. – Meeting with local architect

Source: EAB interviews and analysis.

Finding a Good Fit and Building a Brand

The candidate concierge has helped SFASU recruit MGOs who will have a long tenure at the institution. At the same time, she has helped enhance the school's reputation among future candidates.

The transparency that the candidate concierge brings allows candidates who are ill-suited for the institution to opt out early. Candidates who go through the process end up being much stronger cultural fits for the university and the community. As a result, SFASU has seen higher retention rates.

As an added bonus, candidates' experiences with the concierge tend to leave them with a good impression of the institution. Often, they tell others about SFASU, even if they don't take a position there. The office has developed a regional reputation as a great place to work.

Candidate Concierge Tactic Yields Short- and Long-Term Benefits

Finding a Good Fit Now…

> Our institution is not located in Houston, it's not located in Dallas, it is in Nacogdoches. We have to sell the town as much as we have to sell the university and the position. They might be really qualified, but if they do not like living in a small town—then they will not stay.

April Smith, Associate Director of Development
Stephen F. Austin State University

Saves money and effort on candidates who would not have been retained

…While Building a Brand for the Future

> Even if they are not the right candidate for us, I still want to have a positive relationship with them. Just because they are not the right fit today does not mean they will not be five years from now.

April Smith, Associate Director of Development
Stephen F. Austin State University

Generates positive buzz and helps build a pool of future candidates

Source: EAB interviews and analysis.

An Incomplete Picture

Another approach to candidate wooing is to integrate information about career paths and professional development opportunities into the recruiting process. Many advancement offices struggle in this area.

Despite growing investments in retention and strategic talent management initiatives at many universities, little is being done to proactively communicate these efforts to candidates in the recruiting process. For example, one institution that heavily invested in a talent program and saw great success in terms of retention and recruiting blandly listed these developments on their career website as “ongoing professional development opportunities.”

Recruitment Materials Often Fail to Highlight Talent Initiatives

What’s Missing from MGO Recruitment Ads and Brochures?

Unique Institutional Culture

Overlook talent-related achievements, such as improved retention rates or noteworthy anniversaries

Staff Testimonials

Lack stories from staff about why they chose the institution and what they enjoy most about the office and their role

Training Program Details

Fail to discuss initiatives for skills enhancement, staff training, and professional development opportunities

Source: EAB interviews and analysis.

Would I Feel at Home at Your Institution?

Not every institution markets itself poorly to potential candidates. For example, Penn State has created an online brochure to highlight the advancement division's stimulating culture. It promotes the institution's values and the benefits of belonging to the community, such as football games at Beaver Stadium and the area's high-quality public schools. Anyone who is considering a position at Penn State can find the document easily through the division's career opportunities page.

Highlight Your Unique Institutional Culture to Attract Good Fit Talent

Penn State's Brochure Emphasizes Culture and Values

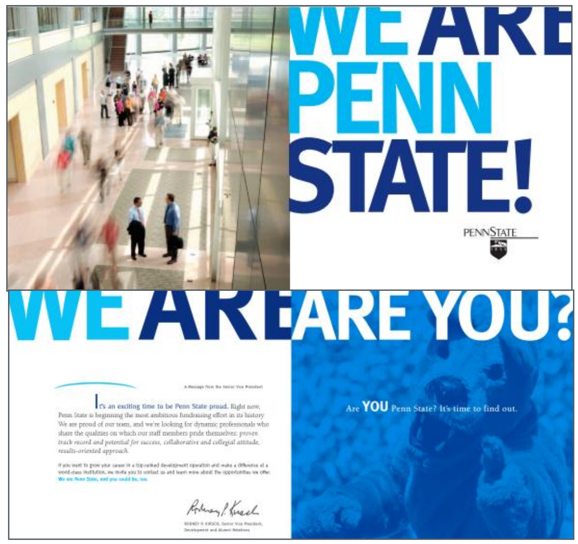


IMAGE CREDIT: PENN STATE WEBSITE

“We are Penn State! It's a shout that rocks the stands at Beaver Stadium every autumn, as 100,000 fans cheer the Nittany Lions on to victory.

“Nearly anything undertaken at any university is done at Penn State and often done better…. As Penn State's development team, we never lose sight of the fact that what we do has the power to change lives.

“We pride ourselves on having one of the most advanced development information infrastructures in the country.

“Penn State Development takes pride in growing our own. Few development programs can equal the opportunities for professional training and achievement that we make available to our staff.”

Source: Penn State website, http://giveto.psu.edu/s/1218/images/editor_documents/Employment_Opportunities/WeArePennState2010.pdf; EAB interviews and analysis.

What Is It Really Like to Work There?

The University of Michigan has developed a website featuring staff testimonials that give candidates an inside look into their organizational culture. The individuals featured on the site represent a range of positions, including the MGO role. Each profile details the staff member's background, their current role, and the reasons why they enjoy working in development at Michigan.

Staff Testimonials Give Candidates Insight into Office Culture

University of Michigan's Staff Stories Web Page

Page is housed within a dedicated Careers Portal

Staff represent a range of positions, including MGO

IMAGE CREDIT: UNIVERSITY OF MICHIGAN WEBSITE

Stories feature staff backgrounds and values

Source: University of Michigan website, https://leadersandbest.umich.edu/page.aspx?pid=447; EAB interviews and analysis.

How Can I Advance My Career?

The UCLA Development website focuses on the division's commitment to professional development and training. Rather than hinting at vague and ill-defined opportunities, they list specific examples, such as external affairs panel discussions and a certificate in planned giving. UCLA prominently features these initiatives as a link on the main page of the division's careers portal, and they brand it with the tag line, "At UCLA, we don't just hire the best. We provide training so you can be the best."

Show Candidates How They Can Grow with Your Organization

UCLA's Development Careers Website Spotlights Training Opportunities

Featured on development career portal

"At UCLA, we don't just hire the best. We provide training so you can be the best."

IMAGE CREDIT: UCLA WEBSITE

Specific examples of recent training sessions demonstrate commitment to growth

Source: UCLA website, http://developmentcareers.ucla.edu/training.html; EAB interviews and analysis.

Showcasing Career Growth Opportunities

UC Davis has taken the strategy of communicating about professional development one step further by weaving it into each step of the recruiting process.

In 2013, the institution outlined new career pathways for MGOs. Recognizing the recruiting value of this initiative, UC Davis created a career grid that outlines the new opportunities for advancement and a plan for sharing it with candidates.

Hiring managers use the grids throughout the recruiting process to highlight potential career paths for candidates. They help candidates evaluate how a career at UC Davis can map to their own personal goals. They also send a strong message that the division is committed to staff retention and talent development.

University of California, Davis Highlights Retention Initiatives to Attract Talent

Development Officer Classification Grid

- Developed in 2013 to retain MGOs and provide new career paths
- Organizes MGOs into six levels differentiated by responsibilities, dollars raised goals, and visit targets
- Provides management and non-management options for growth

Grid Reinforced at Each Stage of Recruiting

Identify Potential Candidate

- Receive a referral from a personal contact
- Connect with a standout presenter at an industry conference

Candidate Networking

- Meet with candidate by phone and send personalized email
- Attach a simplified version of the grid

Informational Interview

- Show candidate where in the grid the position fits
- Delineate potential career paths in the grid

On-Campus Interview

- Review the grid and career path opportunities
- Help candidates applying for multiple positions understand their differences

Source: EAB interviews and analysis.

Gauging Reactions to Performance Metrics

At DePaul University, candidates get a preview of the MGO role through two-way discussions about performance metrics.

Experienced candidates tend to assume—often incorrectly—that the performance goals at their new institution will be much like those at their former institution. When this isn't the case, it can cause friction, poor performance, and turnover among MGOs.

At DePaul University, MGO candidates are introduced to the performance goals they'll be expected to achieve in interviews for the position. Interviewers walk candidates through a copy of the performance metrics grid and invite them to ask questions about it.

This tactic is a great litmus test. While some candidates respond with excitement, others grow visibly uncomfortable.

DePaul University Overviews Performance Metrics During Interview

1. Applicants travel to campus for interviews with Advancement team
2. Candidates receive a walkthrough of divisional performance metrics as part of interview
3. Metrics include solicitation, contact, and dollar goals along with portfolio distribution
4. Candidates are invited to ask questions and respond to performance metrics
5. Interviewers assess candidates' reaction to the metrics as part of overall evaluation
6. Interviewers also test candidates' ability to execute on metrics via a portfolio exercise

Source: EAB interviews and analysis.

Bridging Wooing and Onboarding

DePaul's strategy woos candidates by introducing them to the advancement division's culture of transparency and high achievement. At the same time, it eliminates the surprise factor around performance accountability.

Through this process, candidates get the information they need to make an informed decision when they receive an offer. They can judge for themselves whether they will be successful at meeting the role's expectations.

DePaul University Tactic Increases Transparency and Tests Cultural Fit

Typical Barrier:
Lack of Transparency

Solution:
- Give candidate a clear summary of the division's goals and performance metrics
- Embed metrics discussion into the interview well before extending an offer

Typical Barrier:
Experience Doesn't Always Mean a Good Fit

Solution:
- Allow interviewers to evaluate whether the candidate fits with team culture
- Surface areas for additional skills development and focus during onboarding

Typical Barrier:
Misaligned Expectations

Solution:
- Eliminate the post-hire surprise factor around performance metrics
- Help candidates reflect on whether they are comfortable with the division's goals and metrics

Source: EAB interviews and analysis.

Strategy #4: Accelerate Acculturation and Productivity

Strategy in Brief

Advancement leaders complement orientation sessions with easy-to-use, on-demand resource centers, such as manuals and websites. Key advancement staff in prospect research and principal gifts partner with new hires to discuss gift strategy and help them avoid common mistakes. Monthly all-MGO meetings focus on gift strategy to model successful approaches for less-tenured fundraisers.

Problems Addressed

Orientation sessions overwhelm candidates with information but rarely touch on key questions surrounding gift strategies and challenges that are unique to the institution’s donor base. New hires have few on-demand resources they can consult when they have questions. They are forced to proactively broker interactions with more senior MGOs and prospect researchers, which many fail to do.

Diagnostic Questions

1. Are newly hired MGOs directed to consult easy-to-use manuals and websites to supplement the information they learn in orientation?

   ___Yes ___No

2. Do prospect researchers brief new hires on their portfolios and help them develop gift strategies?

   ___Yes ___No

3. Are new hires asked to meet with advancement leadership to learn more about their portfolios?

   ___Yes ___No

4. Do all MGOs meet regularly to brainstorm gift strategies and share successful cultivation approaches?

   ___Yes ___No

5. Are these meetings focused on divisional strategy and problem solving rather than daily work flows?

   ___Yes ___No

Profiled Institutions

University of Miami
- Institution type: Four-year, private
- Enrollment: 16,900 students (11,400 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Large suburb (Coral Gables, Florida)

Vassar College
- Institution type: Four-year, private
- Enrollment: 2,500 (all undergraduate)
- Carnegie classification: Baccalaureate colleges—arts and sciences
- Campus setting: Large suburb (Poughkeepsie, New York)

Miami University
- Institution type: Four-year, public
- Enrollment: 17,900 (15,500 undergraduates)
- Carnegie classification: Research university (high research activity)
- Campus setting: Fringe town (Oxford, Ohio)

The First Days on the Job Are Critical

Many CAOs think that the recruiting process ends after their office extends an offer and the candidate accepts. Yet many new hires just don't work out. They may need too long to ramp up, they may struggle to mesh with the office culture, or they may make a big faux pas with a donor.

Whether an MGO ultimately succeeds or fails in the role is often determined by his or her first few months. Luckily, advancement leaders have some say in how these first few months go. The onboarding process that they establish sets the tone for the MGO's career at the institution.

Why Onboarding Matters Even for Experienced Hires

50%
Of senior outside hires fail within 18 months of their new job

90
Days that hires have to prove themselves in their new job

A Major Adjustment

"For an experienced fundraiser, shifting from one institution to another may not seem like a major adjustment, but there can be big surprises.… Organization culture and politics can be quite different from one place to another.…The bottom line is that you cannot assume that even an experienced fundraiser will automatically know where to go when she has questions."

Jon Derek Croteau
Author
The People First Approach

Source: Watkins M. *The first 90 days,* Boston, MA: Harvard Business School Press, 2003; Croteau J.D., *The People First Approach* Washington, D.C.: Council for the Support and Advancement of Education, 2009; EAB interviews and analysis.

“I’ll Just Figure It Out Later”

The onboarding process is so crucial that many issues with new hires originate not from choosing the wrong people during the recruiting process, but rather in failing to train them properly through orientation programs.

Many orientations give the new hire lots of information but fail to truly integrate them into the organization. They rarely touch on the institution’s fundraising strategy or its unique donor challenges.

When new hires encounter problems, they rely on whatever they learned at their previous institution. This can lead to mixed and sometimes outright disastrous results, including office tension and offended donors.

Typical Orientation Leaves Many Questions Unanswered

Database Protocols

Which field do I use to record notes from a phone conversation?

Staff Organization

I know Jim is a senior leader, but what does he oversee?

Career Opportunities

What resources are available to me for learning a new skill?

Office Procedures

How do I get a new prospect assigned to me?

Collaboration Norms

Who do I need to involve in processing this gift?

Donor Strategy

Can I use the same approach here that we used at my old institution?

Source: EAB interviews and analysis.

Where the Rubber Meets the Road

To help initiate the onboarding process, the University of Miami designed a "jump-start" manual for all new MGOs. The manual, which was developed by a committee of managers and veteran MGOs, includes answers to FAQs and tips for success. It covers a range of topics and features a list of additional resources for each topic.

Miami pairs the manual with a one-on-one meeting between the new hire and the AVP of Advancement Services. During this meeting, the AVP gives the manual to the new hire, walks through it, and highlights key sections. At the end of the session, she answers questions from the new hire and provides additional documents for getting up to speed, including a list of past large gifts, recent advancement milestones, and noteworthy university accomplishments to share with donors.

University of Miami's Jump-Start Manual Frontloads Key Information

Frequently Asked Questions…

Manual Table of Contents

1. Who works for whom and what do they do?
2. Where are the policies?
3. How does training work?
4. How do I obtain my systems access?
5. How do I facilitate a planned gift?
6. How does the acknowledgement system work?

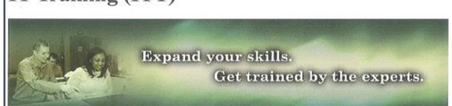
…Linked to Answers and Resources

UNIVERSITY OF MIAMI
Division of University Advancement - Training Requirements

Employee Name: ______________________ Title: ______________________
Department: ______________________

List of Classes	Required
General Training	
1) Advancement Orientation - Gables	________
2) Advancement Orientation - Medical	________
3) JumpStart (Development Officers)	________
Hands-On System-Related Training	
4) System Inquiry/Overview & Constituent Record Mgmt (Pre-Req to all System-Rel Classes)	________
5) Development Services Proc. Workshop (Pre-Req to Gift Records Inquiry)	________
6) Gift Records Inquiry	________
7) System Update Part 1 (Individual Bio Updating)	________
8) System Update Part 2 (Organization Records and Relationships)	________
9) Prospect Management Inquire and Update	

IT Training (ITT)



Information Technology Training (ITT) offers high quality computer training classes for University of Miami employees (Faculty, Staff, and Administration). Classes are held in a state-of-the-art instructional computer lab (1100J) in Gables One Tower across from the Coral Gables campus and at several other academic labs on campus. In addition to scheduled classes, ITT offers "Made-To-Order" mobile training classes that can be delivered at almost any University of Miami location. ITT can also provide access to a significant catalog of Microsoft E-Learning online courses through UM's Microsoft Academic License Agreement.

Online Registration

To register online for ITT training classes, please click here… REGISTER

IMAGE CREDIT: UNIVERSITY OF MIAMI WEBSITE

Source: Image retrieved from http://www.miami.edu/index.php/professional_development__training_office/competency_programs/; EAB interviews and analysis.

Hitting the Ground Running

Although they have been using the jump-start manual for more than a decade, Miami's AVP for Advancement Services still sees it as the most critical component of their onboarding program.

Advancement leaders at Miami hope to expand upon the manual through follow-up sessions or check-ins. The AVP would use these sessions to touch base with new hires, see if they have additional questions, and pulse-check how they are doing in the role.

They also hope to integrate the jump-start manual into their online learning platform for staff.

Miami's Jump-Start Manual Helps Fundraisers Quickly Ramp Up

New Hire Benefits

- Gains overview of key resources and processes
- Understands where to direct questions
- Enhances introduction to office culture and institution

Next Steps for Jump-Start Manual

Building in follow-up

Moving to virtual platform

A Heads Up for New Hires

"It gives them a heads up—for example, if you need to know more about gift agreements, they learn that I do a whole class on gift agreements. The manual gives them what they need to know so they don't trip up early on. And the format is very helpful in the first few months when they need quick answers to particular questions."

Ann House
Associate VP for Advancement Services
University of Miami

Source: EAB interviews and analysis.

Focusing on Strategy and Planning

Vassar College has developed portfolio sessions to increase new hires' knowledge of the institution's strategy and donor base. These sessions allow for each new MGO to work with the prospect research team to learn about their portfolio and get quick tips on using the database for outreach.

After collaborating with prospect research, the new hire meets with the director of leadership gifts across several weeks. These conversations cover portfolio history, key prospects, and individual performance metrics, acculturating the MGO to Vassar's unique approach to fundraising.

Vassar College's Portfolio Sessions Set Expectations

Onboarding Activities

- Campus tour and information sessions
- Key stakeholder introductions
- Strategy sessions
- Meetings with divisional directors
- Donor events
- MGO shadow

New Hire Strategy Session

- Meet with prospect research team to review portfolio and understand donor context
- Meet with the director of leadership gifts to:
  - Discuss portfolio history
  - Identify key prospects
  - Outline visit acquisition strategy
  - Review individual performance metrics, including:
    - Number of visits per month
    - Percentage of pool giving to the annual fund
    - Number of proposals sent and asks secured

Source: EAB interviews and analysis.

Helping New Hires Adjust

Vassar's sessions have yielded a number of positive outcomes. They align new hires' expectations, reduce common mistakes made by inexperienced MGOs, and build staff morale.

The sessions may also have a downstream impact on staff retention. Vassar has seen a retention rate about one year above the industry average. While a number of factors figure into an MGO's desire to stay at an institution, strong early support from across the advancement division surely contributes.

Creating Dedicated Time and Space for New MGO Acculturation

Benefits of Vassar's Strategy Sessions	
✔	Align expectations
✔	Reduce common mistakes
✔	Provide new hires opportunities to ask questions
✔	Ensure performance metrics are clear and reflective of candidate abilities

3 years

Average tenure of MGOs at Vassar College

Learning Our Stories

"I think we are storytellers. You have to learn what stories you are going to tell, and the only way to do that is to be a participant in the life and community here at Vassar."

Natasha Brown
AVP for Individual Giving
Vassar College

Source: EAB interviews and analysis.

Scaling MGO Onboarding

Larger institutions with bigger staffs may struggle to scale strategy onboarding. Miami University focuses high-value sessions where they matter most by targeting major gift officers working at the top of the donor pyramid.

Miami's monthly MGO forums go beyond the mechanics of fundraising to enhance the broader strategies underpinning successful gift asks. The 90-minute meetings with top prospects' gift officers revolve around developing gift strategies, identifying problems, and brainstorming solutions.

Miami University Leverages Monthly MGO Forums

Status Quo MGO Meetings

- Discuss and plan action steps
- Focus on assigning tasks
- Emphasize accountability and follow-up
- Organize agendas around daily work flow

Innovative Approach to MGO Forums

- Discuss six- and seven-figure gifts only
- Focus on gift strategy
- Emphasize problem identification and solution brainstorming
- Organize agendas around big-picture divisional strategy

Miami University's MGO Forums

- Held monthly for 90 minutes
- MGO attendance required; Skype/dial-in permitted
- CAO and AVP attend, sessions organized by senior MGO
- Prospect researcher present

Source: EAB interviews and analysis.

A Multitude of Outcomes

Feedback on these sessions from MGOs has been very positive. Attendees say they became stronger fundraisers after learning more about gift strategy and gaining exposure to senior leaders.

The sessions also serve as a professional development opportunity for tenured MGOs who are interested in gaining more exposure to senior-level strategy discussions.

Sessions Benefit Individual MGOs and the Division

Monthly Forum Benefits

- Provides insight into strategy planning
- Gives MGOs executive-level exposure
- Helps new hires acculturate to division and institution
- Provides regular opportunity for brainstorming
- Serves as a professional development opportunity

Becoming Stronger MGOs

"In recent years I have heard more from MGOs that it is beneficial to them professionally to be in the room listening to how strategy session development works. They tell me that they think that they are becoming stronger MGOs just by being in the room hearing the VP or AVP discuss strategy."

Brad Bundy
Senior Associate Vice President and Campaign Director
Miami University

Source: EAB interviews and analysis.

Winning the War for Experienced MGOs

The four preceding strategies take aim at discrete components of MGO hiring practices. Today, some institutions are exploring ways to holistically administer their entire talent management programs through new approaches to strategic talent management (STM). The final strategy in this column explores ways to unlock STM through a dedicated function as well as through existing resources.

EAB Research Spotlights Areas for Improvement

Candidate Sourcing	Hiring and Onboarding	Holistic Talent Management
Strategy #1: Systematize Vacancy Planning	**Strategy #3:** Develop Candidate-Centered Recruiting	**Strategy #5:** Unlock Strategic Talent Management
Strategy #2: Move From to Proactive Pursuit	**Strategy #4:** Accelerate Acculturation and Productivity	

Strategy #5: Unlock Strategic Talent Management

Strategy in Brief

Dedicated talent management staff members forecast vacancies, aggressively retain and develop top performers, and build a long-term talent strategy for the advancement division. Institutions that cannot dedicate full-time staff to this function achieve these goals by allocating part of an MGO's time to them or assigning senior fundraisers to a talent management committee.

Problems Addressed

Talent management is conducted in a piecemeal, reactive way. Because it is a side-of-the-desk job, no single individual plans the advancement division's talent strategy. Vacancies are filled as they occur with a constantly revolving crop of candidates, many of whom are far from qualified for MGO work.

Diagnostic Questions

1. Are specific staff members in advancement tasked with planning the division's talent strategy?

   ___Yes ___No

2. Do advancement leaders dedicate full-time staff members to anticipating vacancies and proactively identifying qualified candidates?

   ___Yes ___No

3. Does a strategic talent management committee composed of experienced advancement staff meet periodically to plan the division's talent strategy?

   ___Yes ___No

4. Are committee members tapped to actively recruit MGOs from their personal networks?

   ___Yes ___No

5. Does a staff member split his or her time between fundraising and strategic talent management?

   ___Yes ___No

Profiled Institutions

University of Michigan

- Institution type: Four-year, public
- Enrollment: 43,700 students (28,300 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Ann Arbor, Michigan)

University of Florida

- Institution type: Four-year, public
- Enrollment: 49,900 students (33,200 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Gainesville, Florida)

Profiled Institutions (cont.)

Massachusetts Institute of Technology

- Institution type: Four-year, private
- Enrollment: 11,300 students (4,500 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Cambridge, Massachusetts)

California Institute of Technology

- Institution type: Four-year, private
- Enrollment: 2,200 students (1,000 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Pasadena, California)

Iowa State University

- Institution type: Four-year, public
- Enrollment: 33,000 students (27,700 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Small city (Ames, Iowa)

Rice University

- Institution type: Four-year, private
- Enrollment: 6,600 students (4,000 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Large city (Houston, Texas)

Talent Management: A “Side of the Desk” Job

At many institutions, recruiting tasks are completed ad hoc and piecemeal. A good deal of the work falls to AVPs, the CAO, and other members of the division whose full-time responsibilities inhibit their effectiveness as recruiters. Recruiting becomes a “side of the desk” task that often goes overlooked.

Ideally, CAOs would formally assign staff members to the tough work of talent management. Yet it can be difficult to commit resources, given the need for frontline fundraisers and many advancement shops’ focus on ROI. Every dollar that’s used to fund a talent management position could instead go to an MGO. Many CAOs find that trade-off too difficult to make.

Advancement Leaders Have a Host of Responsibilities on Their Plates

Talent Management Crowded Out by More Pressing Tasks

- Stewarding donors
- Soliciting new gifts
- Managing reporting staff
- Guiding division strategy

Little time left for recruiting

A Nice to Have?

"Sure, I would absolutely like to do a better job in hiring. But I am busy and my people are always on the road. It’s tough to say we are going to make this a priority right now, especially as we have big goals to meet in these last two years of our campaign."

Chief Advancement Officer
Private Research University

Source: EAB interviews and analysis.

A Worthwhile Investment

However, research suggests that this approach may be short-sighted.

In *Effective Measures*, Darrow Zeidenstein illustrates the ROI of STM by simulating the performance of two virtual major gift teams, only one of which benefited from a dedicated STM function. He tested their performance across a series of simulated fundraising campaigns using GoldSim software and a Monte Carlo statistical simulation and found that the STM team outperformed the non-STM team by $11 million. Across the simulated campaign, they averaged $1.6 million more funds raised per year.

Based on these major gift results, Zeidenstein estimates it would be worth investing up to $200,000 in STM. However, the STM function's impact on hiring and retaining other fundraising staff, such as those in planned giving and corporate and foundation relations, could increase the opportunity cost of not investing in STM well above the model's $1.6 million per year.

Talent Management Pays Off

Zeidenstein's Talent Management Simulation

Major Gift Team Without STM	**Major Gift Team with STM**
High Turnover	*Low Turnover*
Full Staff: 20 FTE	Full Staff: 20 FTE
Turnover Rate: 5%	Turnover Rate: 3%
Median MGOs Lost[1]: 8	Median MGOs Lost[1]: 5
$76M	$87M
Median funds raised in one campaign[2]	Median funds raised in one campaign[2]

1) Median staff lost across 50 simulation trials of one campaign.
2) Median funds raised across 50 simulation trials of one campaign.

Source: Zeidenstein D, *Effective Measures: The Return on Investing in Talent Management,* "Making the Budgetary Case for Strategic Talent Management," New York: Council for Advancement and Support of Education, 2012; EAB interviews and analysis.

An Overview of Top STM Functions

Admittedly, STM is not a new idea in university advancement. Schools such as the University of Michigan and the University of Florida have had dedicated functions for a number of years.

These schools have been the primary players in this area, actively participating in the conference circuit and generously sharing their experiences with their colleagues at other institutions.

They vary widely in terms of size, scale, reporting lines, and special focus areas, which underscores that there is no "one size fits all" approach to an STM function.

Size, Reporting Lines, and Focus Areas Vary by Institution

	University of Michigan	University of Florida	Massachusetts Institute of Technology	California Institute of Technology
Year Founded	2004	2011	2013	2013
Total FTE	14	5	6.5	4
Title of Senior Staff Member	Executive Director	Associate Vice President	Executive Director	Senior Director
Reporting Line	Associate Vice President	Vice President for Development and Alumni Affairs	Associate Vice President and COO	COO and Associate Vice President
Special Focus Areas	Student Internships Learning Programs	Succession Planning Organizational Design HR Analytics	Organizational Design, Sustained Resources for Professional Development Talent Reviews, Compensation, and Employee Recognition	Organizational Development
Other Unique Features	5 FTE – Staff Development	1 FTE – Organizational Development	1 FTE – HR Partner 2 FTE – Recruiting	1 FTE – Search 1 FTE – Training

Source: Institutional websites; EAB interviews and analysis.

From Human Resources to Human Capital

Institutions that maintain a dedicated STM function are transforming recruiting and retention practices in university advancement. They take a more proactive approach to working with their fundraising talent and ensure higher productivity and longer tenures.

Strategic Talent Management Reimagines Recruiting

Core Responsibilities

Human Resources (HR)	Strategic Talent Management (STM)
▪ Reacts to business needs as they arise ▪ Implements basic training programs to orient new employees ▪ Executes administrative tasks associated with hiring, compensation, and benefits	▪ Anticipates and proactively plans for human capital needs ▪ Builds ongoing training programs focused on critical development needs ▪ Ensures sustainability by identifying and retaining key performers and successors

Impact on Recruiting Efforts

HR	STM
Confirms that a job ad was posted in the planned locations	Identifies and recruits star talent before a position opens
Performs interviews that verify information in a candidate's résumé	Designs and implements interview strategies that holistically assess candidate fit
Completes appropriate steps necessary to make a new hire	Incorporates competency-based recruiting strategies to make faster, smarter hires

Source: EAB interviews and analysis.

Sharing the Workload

Yet not every institution can dedicate the resources to supporting an STM function. Two institutions circumvent resource constraints by creating alternative STM structures.

The first approach, from the Iowa State University Foundation, involves an STM committee composed of tenured staff members. They volunteer to divide the work amongst themselves, rather than hiring new, dedicated staff members. The group was formed three years ago and has become a leadership opportunity for senior fundraisers.

Members serve on up to two committees of their choice, which span training and development, interview design, and orientation. Some subcommittees are permanent, while others ebb and flow according to the Foundation's needs.

Iowa State University Foundation's STM Committee Model

Committee Logistics

- Involves 10 members representing a range of functions
- Meets three times per year as a full committee
- Includes Foundation VP for Development, AVP of HR and Governance, and MGOs
- Creates a leadership opportunity for senior fundraisers
- Works on initiatives related to foundation priorities via subcommittees

Subcommittee Topics

- Training and Development
- Recruiting
- Peer Mentor Program
- Retention Strategies
- Interview Design
- Orientation and Onboarding

Completed Projects

- Development Officer 101 Training
- Orientation and Onboarding Process
- Peer Mentor Program

Source: EAB interviews and analysis.

Enhancing Organizational Buy-In

Advancement leaders at the Iowa State University Foundation found that the committee model increases staff buy-in for talent management while bringing experienced staff members' insights to bear on key university priorities. Right now, they're working to empower committee members to become recruitment ambassadors, as the Foundation plans to recruit several staff members across the next year. Advancement leaders will turn to STM committee members during this process to help identify and cultivate potential candidates.

Committee Model Increases Staff Investment in Talent Management

Lessons Learned From Committee Model

1. Mobilize staff to address organizational needs
2. Appoint high performers, past collaborators, and staff interested in gaining leadership experience
3. Use staff feedback to assess and revise programs
4. Empower committee members to be talent recruitment ambassadors

Becoming Part of the Process

"With this arrangement, I get a lot of buy-in from the organization. They feel like they're part of the process, and they really feel invested in hiring the best person for our organization. It makes it easier for me to say something like, 'I know you're going out to a lot of conferences this summer, so I need your help in recruiting the best people.'"

Kevin Stow
AVP of HR and Governance
Iowa State University Foundation

Source: EAB interviews and analysis.

Wearing Two Hats

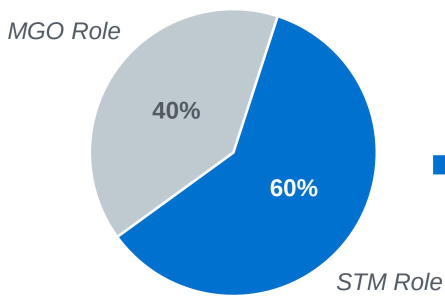
The second approach to STM comes from Rice University, which has developed a hybrid MGO/STM role.

As Rice's last campaign was drawing to a close, one of their MGOs expressed an interest in management and mentoring. Sensing an opportunity, Rice's Vice President for Resource Development, Darrow Zeidenstein, created a blended role that includes both STM and MGO responsibilities.

This staff member focuses on building the candidate pipeline through networking and informational interviews, as well as fundraising. Her STM responsibilities on any given day might include an informational interview, at least one meeting with a senior staff member about searches in his or her area, a session with a staff member about his or her career and training needs, and some time dedicated to emailing contacts.

Rice University's Blended Talent Management Position

Hybrid STM/MGO Role



Key Talent Management Responsibilities

- Focuses on talent recruitment
- Builds candidate pipeline through networking and informational interviews
- Updates senior leaders about search process for open positions
- Creates new onboarding plans for all divisional roles
- Helps implement new professional development programs

Reciprocal Skills

"I think all those skills that you hone as a major gift officer are hugely helpful in this role. When I talk with people, I try to listen and see how that person would fit in our team in the same way that I would talk with a donor about what they want to do with their wealth that would make a difference in their life."

Iska G. Wire, CFRE
Senior Director of Talent Management
Rice University

Source: EAB interviews and analysis.

A Delicate Balancing Act

Rice's approach has many benefits, but also some drawbacks. The role involves juggling and trade-offs, and the staff member who fills it has less capacity than a full-time STM staff member would for skills training and other programs.

Yet the blended role has also increased candidate quality and overall candidate yield. Other institutions looking to expand their STM capabilities may look to Rice as a replicable example whose recruiting outcomes justify dividing the staff member's time.

Hybrid Role Comes with Trade-Offs

Benefits

- Increases talent pipeline and candidate quality
- Promotes strong coordination between development and talent management
- Provides next-step career opportunity for a talented MGO

Drawbacks

- Reduces MGO headcount by ½ FTE, potentially impacting funds raised
- Requires staff member to divide time and attention; some administrative support required
- Limits capacity to develop skills training, certification programs, and recruitment marketing

A Huge Upside

"The hybrid MGO/STM person can interface with hiring managers and know exactly where they are coming from. Then, she can turn around and know what a candidate is going through and has the ability to create an empathic connection because she's been on the other side of the table. I've seen the quality of candidates and yield increase, and we are in a hot market in Houston. There is an undeniable sense that the talent level has gone up considerably in our shop. There is value in having someone who has walked the walk on both sides and can thus connect the dots better."

Darrow Zeidenstein
Vice President for Resource Development
Rice University

Source: EAB interviews and analysis.

Recruiting Traditional Candidates

Due to time and resource constraints, advancement leaders must carefully choose which recruiting strategies to prioritize.

Every institution can implement quick wins such as sending customized pre-wire emails or designating a single point of contact. Institutions that want to go further can look to longer-term strategies like vacancy forecasting and the comprehensive star file.

Together, these strategies will expand the pipeline of MGO candidates and, over the long term, bring in higher fundraising revenues.

EAB Next-Step Recommendations

Quick Wins

Streamline interview process and communication

- Ensure candidates receive personalized pre-wire emails
- Identify a single point of contact for all candidate questions

Long-Term Strategies

Develop new practices to enhance talent pipeline

- Implement vacancy forecasting to get ahead of MGO vacancies
- Create comprehensive star file to connect and track high-potential candidates

Source: EAB interviews and analysis.

Study Road Map

1 | The Fundraiser Talent Crisis

2 | Traditional Candidates

- Strategy #1: Systematize Vacancy Planning
- Strategy #2: Move to Proactive Pursuit
- Strategy #3: Develop Candidate-Centered Recruiting
- Strategy #4: Accelerate Acculturation and Productivity
- Strategy #5: Unlock Strategic Talent Management

3 | **Internal Candidates**

- **Strategy #6: Cultivate Students for Fundraising Careers**
- **Strategy #7: Create Channels for Self-Identification**
- **Strategy #8: Develop Internal Referral Mechanisms**

4 | Nontraditional Candidates

- Strategy #9: Establish Networks and Pipelines

5 | Toolkit Resources

- Departure Risk Appraisal
- Social Media Referral Campaign Strategy Guide
- Candidate Competency Worksheet
- Interview Evaluation Matrix Competency Assignments
- Competency Question Bank

Pursuing Alternative Pipelines

Some institutions are beginning to look beyond the traditional recruiting pipeline. Currently, the demand for talent outstrips supply, meaning there are many more openings than experienced fundraisers looking for work.

As a result, some advancement leaders are exploring alternative sources for talent, including internal candidates and non-traditional candidates.

Some Institutions Expanding Their Talent Search

Supply Unlikely to Catch Up

"I've seen 9% to 10% percent increases in the number of job postings year to year—sometimes 1%, 2%, or 3% increases month to month. And it's steady, it's not slowing down. With growth like that, you never catch up."

Zachary A. Smith
Search Consultant
Witt/Kieffer

Compelled to Diversify

"We found that it's a very shallow pool in our area; we're not in a major urban center. In a way, we had no choice but to start looking at new kinds of candidates. We simply weren't getting any experienced fundraisers."

Chief Advancement Officer
Canadian University

Two Populations

Internal Candidates

Nontraditional Candidates

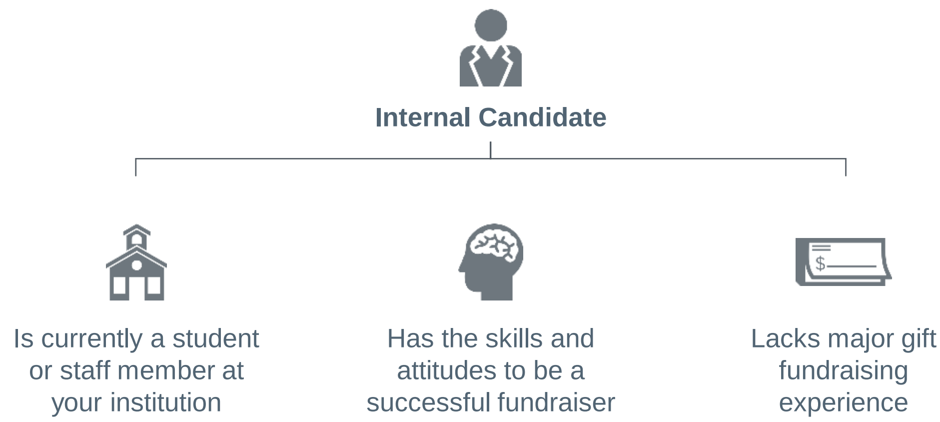
Source: EAB interviews and analysis.

Defining the Internal Candidate

After traditional candidates, internal staff members represent the most desirable population from which to recruit. Because they are already employed at the institution, they are known quantities and good cultural fits.

Many students and staff at your institution will have the skills and attitudes necessary for success in fundraising. However, unlike traditional candidates, they lack prior major gifts experience.

Who Makes Up This Population?



Source: EAB interviews and analysis.

Where Institutions Need to Do More

Institutions looking to bolster their pipeline of internal candidates should adopt three strategies. First, they should reach out to current students to cultivate the pipeline of future MGOs. Second, they should create easy channels for actively interested staff to interact with MGOs, participate in trainings, and vie for open positions. Second, they should develop referral mechanisms to identify and cultivate those individuals who have great potential as MGOs but haven't yet considered a career in fundraising.

EAB Recommendations for Identifying High-Potential Individuals

#1: Cultivate Students for Fundraising Careers

Grow Your Own Talent

"A lot of organizations are hiring, and we are competing for the same talent…. We have among our student body a very natural pool of people that we can recruit from—from the philosophy of growing one's own talent."

Shaun Keister
Vice Chancellor for Development and Alumni Relations
University of California, Davis

#2: Create Channels for Easy Self-Identification

Encourage Staff Participation

"When we make it really tricky or difficult for an internal candidate to apply and be successful, we're sending a message to our staff that we don't think they're good enough."

Erin Sargeant Greenwood
Associate VP for Development
University of Waterloo

#3: Develop Referral Mechanisms for Internal Talent

Provide Opportunities

"When you spot a real impact player on campus, you've got to do everything you can to keep them with the school. That might mean moving them around a bit, but the university as a whole benefits from retaining them."

Greg King
VP for Advancement
University of Mount Union

Source: "Learn How to Hire and Retain Great Fundraisers," *Chronicle of Philanthropy* live video discussion, September 3, 2014, http://philanthropy.com/article/Learn-How-to-HireRetain/148395/; EAB interviews and analysis.

Strategy #6: Cultivate Students for Fundraising Careers

Strategy in Brief

Fundraising careers are publicized at student worker orientation sessions, at career fair booths, through shadowing opportunities, and elsewhere. A formal student internship program provides more hands-on introductions for students who have high potential for success as fundraisers.

Problems Addressed

Advancement leaders neglect the long-term pipeline of talent by ignoring students with fundraising potential. They do little to raise awareness of the MGO role among students, despite the ingrained affinity this population has for the institution. Interested students have few opportunities to explore the MGO role through formal internships.

Diagnostic Questions

1. Do students hear about fundraising careers and the MGO role at multiple points throughout their time on campus?

   ___Yes ___No

2. Does the advancement office present to new student workers about long-term opportunities in the division?

   ___Yes ___No

3. Can students learn about major gift fundraising at campus career fairs?

   ___Yes ___No

4. Are high-potential students exposed to MGO work through a formal internship program?

   ___Yes ___No

5. Do advancement leaders leverage fundraising interns to lighten MGO workloads?

   ___Yes ___No

Profiled Institutions

University of Michigan

- Institution type: Four-year, public
- Enrollment: 43,700 students (28,300 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Ann Arbor, Michigan)

Florida State University

- Institution type: Four-year, public
- Enrollment: 40,900 students (32,500 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Tallahassee, Florida)

Stonehill College

- Institution type: Four-year, private
- Enrollment: 2,500 students (all undergraduate)
- Carnegie classification: Baccalaureate colleges—arts and sciences
- Campus setting: Large suburb (Easton, Massachusetts)

Planting the Seeds Now…

When thinking about internal candidates, advancement leaders should consider reaching out to current students.

The payoff for cultivating students as MGO candidates will not come immediately. Few will start working as MGOs right after graduation. Nevertheless, they represent a pool of talented future candidates that are worth considering.

Innovative institutions have taken steps to plant the seeds with students for a fundraising career. For example, at some colleges, a senior advancement leader promotes careers in philanthropy during the orientation program for all student workers in their office, including tour guides, student callers, and co-op staff. Other institutions allow high-performing student callers to shadow MGOs on visits, help plan donor events, or move into student supervisor roles.

…Pays Off in the Long Term

Igniting Student Interest in Fundraising Careers

Student Worker Orientation Pitch
Outline for student workers the various career paths in the division

Student Caller Mentors
Suggest stretch roles and long-term opportunities to high performers

Lunch and Learn Session
Provide casual settings for curious students to learn about development

In-Class Appeal
Make short presentations to nonprofit management, communications, or business classes

Shadow Opportunities
Give students a glimpse into the life of a fundraiser

Campus Career Fair Booth
Improve your visibility among the broader student body

Source: EAB interviews and analysis.

A Holistic Approach to Student Internships

Formal student internship programs bring a clearer payoff, though they require a slightly larger investment. These programs range widely in format, participants, goals, and content. The most robust and high-profile example is the University of Michigan's Development Student Internship Program (D-SIP), founded in 2006.

Undergraduates enrolled in D-SIP take classes, participate in professional development opportunities, and work in the advancement office over the summer. Each intern is responsible for completing a project, such as identifying major gift prospects and developing a strategy for cultivating and soliciting them.

Michigan's program has seen great success in launching students into nonprofit and fundraising careers. Of the 163 program alumni, 55 are working in the nonprofit sector, including 18 who are currently employed by University of Michigan Development. Of those, nine are currently in frontline fundraiser roles.

University of Michigan's Development Student Internship Program (D-SIP) Sets the Gold Standard

D-SIP's 360-Degree Curriculum

Key Components

1. Academic coursework
2. Professional development opportunities
3. Work experience

Sample Intern Projects

- Identify major gift prospects for an academic unit and develop a strategy for cultivating and soliciting them
- Evaluate an academic unit's international communications to help build an international prospect pool
- Create a plan for cultivating and increasing engagement of an academic unit's recent alumni

Building a Long-Term Pipeline

55 D-SIP alumni currently work in the nonprofit sector

18 Alumni currently employed by University of Michigan Development

9 Alumni working as frontline fundraisers at the University of Michigan

Source: University of Michigan, https://leadersandbest.umich.edu/page.aspx?pid=41; EAB interviews and analysis.

A Range of Approaches to Student Programs

Michigan's D-SIP is truly a best-in-class internship program, but it requires a significant resource investment and considerable staff time. Institutions with more resource constraints may want to consider smaller, less resource-intensive programs.

At Florida State University, the Seminole Booster Program gives students the opportunity for hands-on learning. Students are paired with fundraisers and assist them with tasks such as visit scheduling and stewardship calls. Not only do the students learn about development careers, they also help take some of the administrative work off the fundraisers' plates.

Alternately, Stonehill College's Development Future Leaders Institute pairs a broad academic introduction to philanthropy with a placement at a local nonprofit. Over half of the program's alumni either volunteer full time with service organizations or work at regional nonprofits.

These programs are not only a great way for students to gain some exposure to development careers; they also establish a pool of alumni to whom advancement leaders can turn in future talent searches.

Current and Future Benefits from Development Internships

Expand Today's Office Capacity…

Florida State University's Seminole Boosters Internship Program

Tasks Taken Over by Students

- Stewardship Calls
- Visit Scheduling
- Event Planning
- Proposal Writing

…While Building Tomorrow's Talent

Stonehill College's Developing Fundraising Leaders Institute

Robust Professional Development

- 12 cross-departmental training modules
- Practitioner mentorship
- Donor-nonprofit speed networking challenge

63% Of alumni work in local nonprofits or participate in full-time service[1]

1) Working full time in a public service program includes, but is not limited to, Teach For America, AmeriCorps, Peace Corps, and Jesuit Volunteer Corps.

Source: EAB interviews and analysis.

Strategy #7: Create Channels for Self-Identification

Strategy in Brief

Advancement staff develop a checklist that ensures MGO job postings are publicized internally in a comprehensive manner. A series of webinars, discussions with MGOs, informational interviews, and open houses raise awareness among internal staff of career possibilities in advancement. Positions are recategorized into job families that facilitate shadowing and mentorships between MGOs and other staff.

Problems Addressed

Recruiting efforts that are focused externally fail to raise awareness among internal staff of MGO openings. Internal staff also have little familiarity with the MGO role, which stifles the rate at which they identify themselves as high-potential candidates. These roadblocks prevent the advancement office from expanding its talent pool and diversifying its recruiting efforts.

Diagnostic Questions

1. Do advancement recruiters focus on hiring institutional staff outside of advancement into MGO roles?

   ___Yes ___No

2. Are MGO postings consistently circulated through a variety of internal channels?

   ___Yes ___No

3. Can internal staff outside of advancement learn about the MGO role through online or in-person informational sessions?

   ___Yes ___No

4. Do internal staff have the opportunity to shadow MGOs to learn more about the role?

   ___Yes ___No

5. Does the advancement office's organizational structure facilitate interactions between MGOs and other staff?

   ___Yes ___No

Profiled Institutions

University of Waterloo

- Institution type: Four-year, Canadian public
- Enrollment: 31,400 students (27,000 undergraduates)
- Campus setting: Small city (Waterloo, Ontario)

DePaul University

- Institution type: Four-year, private
- Enrollment: 24,400 students (16,400 undergraduates)
- Carnegie classification: Doctoral/research university
- Campus setting: Large city (Chicago, Illinois)

Barriers to Entry

Internal staff can be a source of strong MGO candidates. They know the institution, its students, and its culture, which increases the likelihood of success in the MGO role.

Despite their strengths, interested employees face an uphill battle just to enter the candidate pool. Most MGO job postings require years of experience raising major gifts from qualified individual donors. On top of that, job descriptions often ask for experience with grant writing, staff development, and campaign planning. Most internal candidates from outside of development lack this experience.

Minimum Requirements on MGO Postings Typically Exclude Internal Staff

Major Gift Officer Qualifications:

Three to five years of experience in raising major gifts from qualified individual donors

Experience in donor qualification, cultivation, solicitation, and stewardship

Experience in fundraising in a college or university setting…. Campaign fundraising experience.

80%
Of MGO job postings list "fundraising" as a required skill

42%
Of MGO job postings list "grant writing" as a required skill

29%
Of MGO job postings list "staff development" as a required skill

Source: Burning Glass Labor/Insight, http://www.burning-glass.com/products/laborinsight-market-analysis; HigherEdJobs job listings, http://www.higheredjobs.com/default.cfm; EAB interviews and analysis.

An Outward Focus

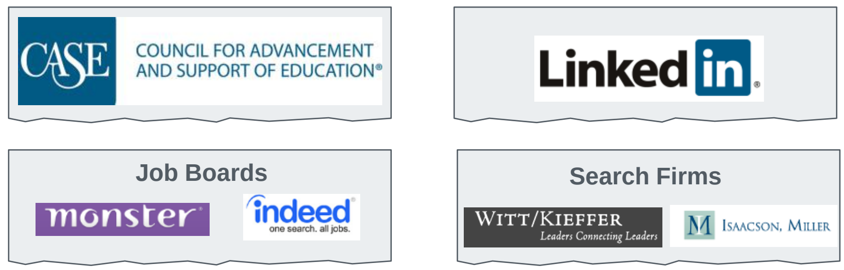
In addition, internal candidates often aren't even aware of MGO openings. Institutions focus the majority of their advertising and marketing efforts externally due to their preference for experienced candidates.

Internal candidates are expected to find out about open positions through the university's HR website. However, these portals are often far from user friendly. They are confusing to navigate, difficult to search, and full of vague job titles that reveal nothing about the position.

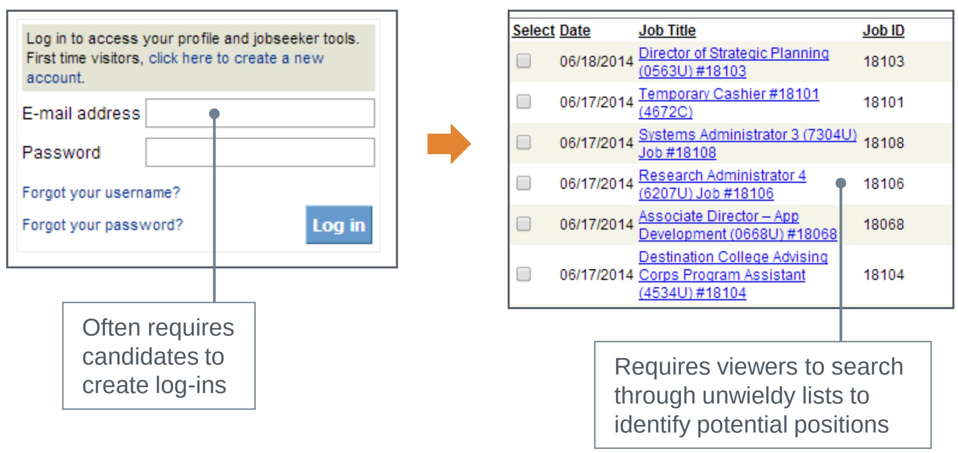
Beyond posting the opening on the HR website, efforts to raise awareness about MGO roles internally are one-off and inconsistent. Sometimes an email about the position goes out to the whole division. Other times, the role is described in passing at staff meetings. In some cases, hiring managers contact a few of their colleagues for leads. As a result, interested individuals within the institution often miss the opportunity to apply.

Traditional Recruiting Efforts Prioritize External Channels

Typical Posting Channels



University HR Website



Source: EAB interviews and analysis.

Is Your Next MGO Hiding in Plain Sight?

The difficulties that hamper internal hires stand in stark contrast to these staff members' potential for effective fundraising. Individuals from many campus units develop skills that translate seamlessly to major gift fundraising. For example, admissions staff members have experience analyzing data, addressing large audiences, negotiating with prospects, and articulating the special strengths of the institution.

Candidates from outside the advancement division also bring terrain knowledge and contacts from other departments. This knowledge can enhance donor interactions. For example, a career services staff member's employer contacts might end up on his or her donor prospect list.

Advancement leaders must do more to raise awareness among internal staff of the possibilities open to them in development.

Internal Candidates Bring Institutional Fit and Knowledge

Advantages of Internal Candidates

- Strengths and background are verified
- Good cultural fit
- Longer retention
- Bring alternate terrain knowledge and contacts

Campus Units That Develop Relevant Skill Sets

- Athletics
- External Relations
- Admissions
- Student Affairs
- Student Success
- Career Services

The Best Future Talent Is Your Current Talent

"In advancement we have this saying, 'the best future donor is a current donor.' We decided that it was time to start applying that thinking to our staff."

Erin Sargeant Greenwood
Associate VP for Development
University of Waterloo

Source: EAB interviews and analysis.

Raising Internal Awareness of Openings

To raise awareness of openings, the University of Waterloo has created a standard internal posting checklist. They use the checklist when publicizing all open positions in the advancement division. It features six key steps for distributing the job posting internally. After completing the items on the checklist, advancement staff wait seven days before posting the opening externally.

Overall, Waterloo's checklist ensures that interested individuals within the department are aware of the opening and have ample opportunity to apply for it.

The University of Waterloo's Job Postings Checklist

Ensuring a Consistent Process

"We want to look inside first when we have an opening.…When we make it difficult for an internal candidate to apply and be successful, we risk sending a message to our staff that we don't think they are good enough."

Erin Sargeant Greenwood
AVP for Development
University of Waterloo

Posting Checklist

1. All open positions announced at advancement team meetings
2. Email about job posting sent to all advancement staff
3. Open role is posted on Advancement (Alumni) LinkedIn circle
4. Advancement staff members are asked to re-post ad on their LinkedIn profiles
5. Role is posted to Alumni website and JobMine[1]
6. Email sent to advancement directors, AVPs, and university partners requesting internal staff referrals

1) JobMine is a web application developed by the University of Waterloo to help students with the co-op process. Students can view information about job postings, interviews, applications, and job offers using JobMine. There is an alumni section that is heavily used and identified as the top alumni benefit offered to alumni by the university.

Source: EAB interviews and analysis.

Educating Staff About MGO Work

Even staff members who are aware of open MGO positions may not realize that they are a good for the job if they have no familiarity with what an MGO does. To overcome this problem, advancement leaders should consider ways to educate internal staff about MGO work.

There is no single best way to do this; a variety of methods can be effective. The goal is to provide an opportunity for university staff to learn more about the position, its responsibilities, and the relevant skills they could bring to the job.

Institutions Use a Variety of Approaches

Common Strategies

MGO Chats

Webinars

Informational Interviews

Divisional Open House

Nurturing Internal Talent

"We had so many vacancies. We had done so many back-to-back searches and the candidate pool was pretty weak. We had exhausted the market and the talent that our search companies could open up for us, so I started with a couple of one-off things to grow our internal talent. It is a great way to do it."

AVP for Development
Canadian Institution

Source: EAB interviews and analysis.

Providing Exposure to the MGO Role

Advancement leaders at DePaul University have adopted an effective approach for educating internal staff about the MGO role. In 2010, they initiated a job families program that allows the central development staff to shadow MGOs. The participants travel with MGOs, participate in donor visits, attend events, and observe gift asks. This tactic provides a channel for staff members to step forward and indicate their interest in learning more about major gifts fundraising. It also gives them a chance to glimpse the daily life of an MGO.

DePaul University Uses Job Families to Encourage Career Path Exploration

1 Establish Job Families

DePaul University rewrote all advancement jobs descriptions to fit into job families, including a category for leadership giving

2 Encourage Collaboration

Managers encourage leadership giving staff members to proactively seek out opportunities to work with MGOs on large portfolios

3 Explore Career Paths

Staff can travel and shadow MGOs, gaining insight into the role while also helping out with administrative tasks

4 Identify Potential Talent

Managers have the opportunity to identify, cultivate, and develop strong internal candidates

Source: EAB interviews and analysis.

Strategy #8: Develop Internal Referral Mechanisms

Strategy in Brief

Institutional staff are prompted to identify qualified internal candidates when MGO positions open up. Referrals are recorded in a central database, which advancement leaders consult whenever vacancies occur. Managers work with their staff members to define their long-term career goal, potentially culminating in an MGO role. They plan the necessary steps to prepare staff for eventual transitions.

Problems Addressed

Communication silos impede the flow of information about qualified internal candidates. Advancement recruiters struggle to connect with high-potential staff members from within the institution. When good leads arise, they are for current openings and have no bearing on future openings. Career pathing receives little emphasis, so qualified internal candidates make few moves outside of their unit.

Diagnostic Questions

1. Do advancement leaders solicit candidate referrals from staff across the institution?

   ___Yes ___No

2. Are referrals tracked in a centrally located database?

   ___Yes ___No

3. Do advancement leaders consult the central database when new vacancies occur?

   ___Yes ___No

4. Do managers periodically sit down their direct reports to discuss career pathing and next steps?

   ___Yes ___No

5. Does the institution provide support and training to upskill employees for new positions?

   ___Yes ___No

Profiled Institutions

University of Waterloo

- Institution type: Four-year, Canadian public
- Enrollment: 31,400 students (27,000 undergraduates)
- Campus setting: Small city (Waterloo, Ontario)

University of Florida

- Institution type: Four-year, public
- Enrollment: 49,900 students (33,200 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Gainesville, Florida)

Identify Promising Internal Talent

Communication silos can impede the identification of promising internal candidates. Since 2011, the University of Waterloo's development office has ramped up its efforts to overcome these silos and build an internal talent pipeline.

Each time the development office has an open position, managers and AVPs in the office and in partner units such as marketing and student housing receive an email listing the job title, its responsibilities, and the last two to three people who held the position. The email asks recipients to name one university employee who would be a good fit for the opening. Respondents need only hit reply and provide a name—no long rationale or explanation is necessary.

Last year, the development office sent out 15 of these email blasts. Each one generated about three new candidates. Today, referral push emails play a big role in Waterloo's overall succession planning efforts.

University of Waterloo's Manager Referral Push Emails

Sample Email Ask

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 skill set for this position includes:

- 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.

Results

Up to three internal names surfaced per open position

Source: EAB interviews and analysis.

The Challenges of Building an Internal Pipeline

Email referral campaigns are a great way to generate candidate leads, but without a system for recording and following up on them, long-term progress on building an internal pipeline will stall.

Currently, most advancement divisions do not maintain a comprehensive list of internal candidates who have been flagged as high-potential talent, applied unsuccessfully for other roles, or expressed interest in fundraising.

With few internal candidates "on deck," advancement divisions struggle to fill vacancies through time-intensive external candidate searches.

No Central Repository and Lack of Follow-Up

Internal Talent

Status Quo

Staff member identified as high-potential talent

↓

Information is not recorded in a central location; person who referred staff member leaves

↓

Good-fit position opens, division scrambles to fill role, and internal candidate misses out

Ideal

Staff member identified as high-potential talent

↓

Individual is entered in talent management database

↓

Staff member is notified when good-fit position opens

Source: EAB interviews and analysis.

Taking It a Step Further

To ensure they aren't missing out on promising internal candidates, the University of Waterloo has paired its referral email blasts with an internal star file.

When the AVP for Development receives an internal referral, she creates a new entry in her Excel-based star file. The file contains candidate contact information, details on how the referral surfaced, level of interest, résumés where applicable, and other relevant data points.

University of Waterloo's Comprehensive Candidate Inventory

Internal Star File Recording Process

1. Internal staff member is referred by colleague or manager to AVP
2. Advancement enters candidate information into database, including contact history and referral source
3. AVP informs central HR of qualified candidate and HR communicates with candidate

Essential Fields to Track

- Name
- Current role
- Institutional history
- Skills
- Past applications
- Referral source
- Contact information
- Comments and notes
- Contact history

Source: EAB interviews and analysis.

Filling Openings Faster

Since introducing the file, advancement leaders at Waterloo have seen reductions in time and cost to hire. In 2012-2013, they filled six out of 15 vacant positions with candidates from the star file. In 2013-2014, about 20% of new hires came from within the institution.

A Focus on Internal Hires and Ongoing Sourcing Reduces Time to Hire

2012-2013 Waterloo Results

68	Names in file
15	Vacancy announcements
6	Internal candidates hired into roles
↑	Quality of applicants
↓	Time to fill vacancy

Investing in Internal Pipeline

"We feel that we have increased the number of hires for a few key reasons…. Our processes are smoother, engage our entire team, and we have more resources focused on sourcing. We have a better candidate pool that we are keeping in touch with, and we are attracting strong candidates because people can see that we are really putting effort into our hires."

Erin Sargeant Greenwood
AVP for Development
University of Waterloo

Source: EAB interviews and analysis.

Creating a Culture That Supports Staff Mobility

The University of Florida is taking even greater steps to make identifying employee competencies, interest areas, and long-term career paths a regular part of the advancement division's professional development initiatives.

To achieve this, university leaders implemented a talent review process. Managers and employees sit down for structured 60- to 90-minute talent reviews and professional development exercises. After the initial comprehensive session, managers and employees update the employee's talent review as needed.

University of Florida's Talent Review Process

Manager Role

- Initiate one-hour conversation with employee separate from performance review
- Help employee identify skill gaps and development goals
- Deliver updated plans to STM staff annually

Employee Role

- Discuss the work environment from employee's perspective
- Create a road map for future growth
- Identify and complete action steps to close skill gaps
- Update manager on progress

Talent Review Questions

- What do you like about your job right now?
- What are your one-, five-, and 10-year career aspirations?
- What is the most effective way for you to learn a new skill?
- What do you need to enhance your engagement in the organization?
- What challenges are you facing in your position/unit/organization?

Source: EAB interviews and analysis.

An Individual Development Plan

During the initial talent review exercise, managers and employees complete a form that asks for information on competency gaps, strategies for growth, success criteria, and time frames. Together, they answer questions about the employee's future goals and translate the answers into specific action steps.

Florida's Advancement Staff Create a Career Map with Next Steps

Employee Professional Goals (3-5 Years)

- Become a Director of Development
- Gain more leadership responsibility

Competency/ Experience	Tactics/ Resources Needed	Success Criteria	Time Frame
List Gaps	*How are we going to fill that gap?*	*What is needed?*	*When will this be completed?*
Improve "the ask"	Attend "asking" workshop at AFP meeting	Make "the ask" more confidently	At August AFP chapter meeting
Gain more face-to-face visit experience	Expand portfolio to include more local donors	Increase face to face visits by one per week	Gradually increase visits over next six months

Source: EAB interviews and analysis.

Not Just Another Piece of Paper

To ensure a successful launch during the program's introduction, Florida invested a considerable amount of time and resources in manager training. All managers were required to participate in a three-hour workshop that included role-play activities, senior leader testimonials, and an opportunity for Q&A. The division's STM staff also shadowed the initial conversations between managers and employees.

Emphasis on Manager Training and Support Accelerates Impact

Talent Review Launch Process

Manager Training Session

- Training delivered by talent management with testimonials from senior leaders in the organization
- Role-play activities
- Communication strategies
- Time built in for Q&A

Emphasizing Value

"We placed a heavy focus on the implementation to ensure managers understood the value. The Talent Review is not another piece of paper to fill out but a crucial conversation to enhance engagement, solicit feedback, and support a productive work environment."

Kristin Green
Associate Director of Talent Development
University of Florida

Source: EAB interviews and analysis.

The Foundation of a Pipeline

The University of Florida is already planning next steps, including building training programs that address broad divisional needs and staff interests. Overall, the approach they've adopted helps customize their talent management strategies to the particular needs of their institution.

Talent Review Data Guide Organizational Growth

Talent Review Process Next Steps

1. Analyze data to discover patterns
2. Provide additional tools and support to managers
3. Build training programs that address broad divisional needs

Fulfilling Critical Talent Needs

"We believe employees own their professional development and the manager facilitates the growth process. As Talent Management, we support this initiative by analyzing the trends in talent reviews and tailoring our training and engagement opportunities to exactly what the organization needs."

Kristin Green
Associate Director of Talent Development
University of Florida

Source: EAB interviews and analysis.

Identifying High-Potential Internal Candidates

To successfully recruit internal talent, advancement leaders should prioritize strategies for raising employee awareness of MGO positions and eliciting referrals of qualified candidates. In the long term, establishing a pipeline of qualified candidates will help decrease the time it takes to fill vacancies.

EAB Next-Step Recommendations

Quick Wins

Ensure recruiting process reaches internal talent

- Regularly prompt managers to identify high-potential staff members
- Ensure vacancies are posted consistently through internal channels

Long-Term Strategies

Build pipelines of internal talent

- Create internal star file
- Develop opportunities for staff to articulate career goals and map out next steps

Source: EAB interviews and analysis.

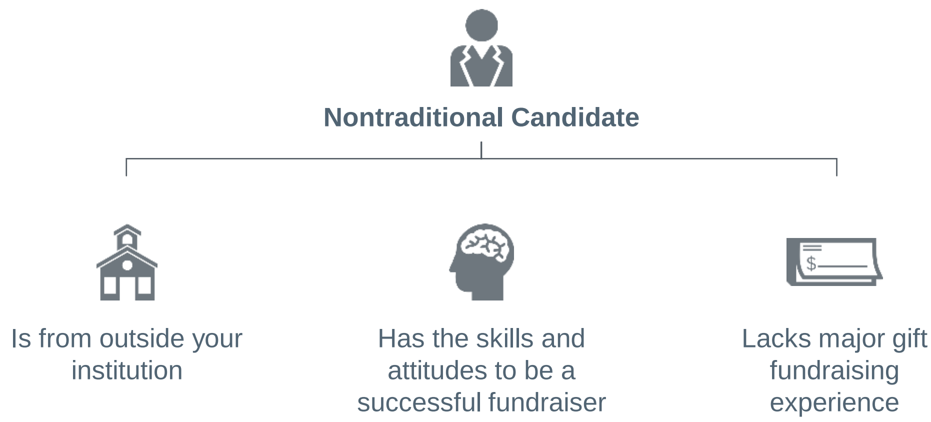
Study Road Map

Defining the Nontraditional Candidate

Recently, advancement leaders have turned their recruiting sights on individuals from out of industry. Nontraditional candidates may lack fundraising experience, but their personal disposition and background in kindred roles can incline them toward success in MGO roles.

Nontraditional candidates pose a double challenge to institutions hoping to recruit them. Not only do they lack experience, but their employment outside of the institution leaves advancement leaders with no established in-roads to connect with them.

Who Makes Up This Population?



Source: EAB interviews and analysis.

Strategy #9: Establish Networks and Pipelines

Strategy in Brief

Alumni affairs staff members notify advancement leaders when they encounter qualified out-of-industry alumni. Advancement leaders convene periodic community career forums to raise awareness in the community of opportunities in advancement. Recruiters prioritize out-of-industry candidates who work for a subset of companies that develop transferrable skills in their employees.

Problems Addressed

Advancement leaders seeking to expand the talent pool by turning to out-of-industry candidates struggle to identify which candidates have the necessary skills to excel as fundraisers. Their professionals lives do not bring them in contact with these individuals so they have few opportunities to make connections and recruit them.

Diagnostic Questions

1. Do alumni affairs staff refer alumni who would succeed in MGO roles to advancement leaders?

   ___Yes ___No

2. Do advancement leaders stage periodic events at which they publicize MGO work to community members?

   ___Yes ___No

3. Can nontraditional candidates who are interested in fundraising access webinars and other online resources about jobs in the advancement division?

   ___Yes ___No

4. Have recruiters developed a list of companies that develop high-caliber employees?

   ___Yes ___No

5. Do advancement leaders use LinkedIn to proactively surface potential leads from out of industry?

   ___Yes ___No

Profiled Institutions

Memorial University of Newfoundland
- Institution type: Four-year, Canadian public
- Enrollment: 18,900 students (15,400 undergraduates)
- Campus setting: Midsized city (St. John’s, Newfoundland and Labrador)

University of Michigan
- Institution type: Four-year, public
- Enrollment: 43,700 students (28,300 undergraduates)
- Carnegie classification: Research university (very high research activity)
- Campus setting: Midsized city (Ann Arbor, Michigan)

An Overwhelming Sea of Potential Recruits

Nontraditional candidates are challenging to hire because, unlike with traditional and internal candidates, there's no ready-made pool from which to recruit. They can be working at any organization, in any sector, in any state or province.

Advancement leaders waste a lot of time, energy, and money hunting elusive nontraditional candidates who may not work out. Few institutions have successfully established networks and pipelines to connect with these individuals in sustainable and low-cost ways.

Hard to Target the Best Nontraditional Candidate Pools

Key Questions About Nontraditional Candidates

Where do I start?

- Wide range of industries teach transferrable skills
- Availability and type of candidates varies by region
- One-off hires from unlikely backgrounds (e.g., sales rep, clergy)

How do I approach them?

- Unclear level of affinity or interest in an MGO career
- Difficult to generalize across broad populations

What is the ROI?

- Difficult to scale or adapt traditional recruiting strategies
- Additional training and support costs up front
- Overall returns uncertain

It's Up to Them to Find Us

"We're open to hiring candidates from out of industry…but it's really up to them to find us, apply to a position, and make the case for their hire. We don't have the time or resources to go look for them."

Chief Advancement Officer
Private Master's University

Source: EAB interviews and analysis.

Targeting a Particular Segment

Because of their remote location, Memorial University in Canada faces significant barriers to recruiting MGO talent. As a result, the advancement division has made several adjustments to their recruiting strategies, including a partnership with alumni affairs.

Recognizing that alumni who are looking for a career change might make good MGO candidates, the development director reached out to the alumni affairs director and established a referral partnership. When the alumni affairs director meets individuals who meet the qualifications for an MGO position, she connects them to the development director for an informational interview.

Memorial has seen an expansion of their candidate pipeline thanks to the partnership. Approximately 20% of their current MGO staff came through this pipeline.

Memorial University's Alumni Affairs Referral Pipeline

Alumni Candidates Identified

- Development director updates Alumni Affairs director about openings and desired skills
- Alumni Affairs director identifies potential candidates during her regular alumni meetings

Development Staff Contacted

- Alumni Affairs director cultivates candidates through a "pitch" for the role
- Alumni Affairs director introduces alumni via email

Informational Interview

- Development director meets casually with alumni to discuss fundraising career benefits
- Strong candidates visit again to meet with a current MGO from a nontraditional background

Partnering for Success

5-7
Average candidate referrals annually

20%
Of current MGOs hired through alumni leads

Source: EAB interviews and analysis.

Sourcing Local Talent

The University of Michigan has launched community career forums to connect with talent in the region. Michigan development holds these forums three times per year on campus and advertises them through email blasts, newsletters, word of mouth, and on the university website.

These forums function like an open house. About 12 to 15 staff members from different areas of advancement attend each session to share quick snapshots of their work and explain why they enjoy working at Michigan. Attendees participate in a variety of activities including résumé reviews, informal chats, speed interviewing, and group information sessions.

The community career forums have been particularly useful for connecting with out-of-industry candidates. In fact, one special session features speakers who are former nontraditional candidates. These staff members talk about why they chose to transition into fundraising, differences to be mindful of, and what they found to be helpful in navigating the transition.

University of Michigan's Community Career Forums

Agenda and Activities

- Staff member introductions and panel
- Group information sessions
- Speed interviewing
- Résumé reviews with current staff
- Informal chats

Nontraditional Candidate Information Session

1. Led by former nontraditional candidate who now works as a University of Michigan MGO
2. Session covers the transition to higher education fundraising, major challenges, and key issues for interested candidates to consider
3. Presenters share lessons learned and helpful resources for transitioning to fundraising

Source: EAB interviews and analysis.

Reaching Diverse Candidates

Michigan's community career forums have seen impressive ROI. Though each event costs only $1,000, they each attract about 80 attendees, 20 to 25 of whom end up being promising prospective candidates. They have led to between six and eight recent hires and have helped advancement leaders connect with candidates in the local community to build the long-term talent pipeline.

An Effective Way to Connect with Local Talent

Results

3	Number of forums held annually at the University of Michigan
80	Number of attendees at recent forum
20-25	Average number of people marked for post-event follow-up
6-8	Number of recent hires from the community career forums
$1,000	Cost of one event (excluding staff time)

Building the Talent Pipeline

"This has been a good way for us to engage new talent and candidates as well as build that long-term pipeline."

Erin Hall-Westfall
Executive Director of Talent Management
University of Michigan

Source: EAB interviews and analysis.

Next Steps and Innovations

The forums have been so successful that Michigan is planning to expand the program. Although the initial forums took place on campus, advancement leaders have begun to experiment with new locations, including downtown Detroit and Michigan's Dearborn campus, which bring out a more diverse candidate pool. Staff members are also exploring ways to take the forums online.

Planning to Expand Community Career Forums

New Locations

Expanding reach to other parts of the region

- Offer forums in different locations around Michigan
- Conducted forum in Detroit, planning to do an event on the Dearborn campus

Virtual Event

Moving beyond physical events

- Partner with third-party vendor to host online information sessions
- Model virtual event off existing resources (e.g., CASE virtual events)

Source: EAB interviews and analysis.

Expanding the MGO Pipeline

Another way to find qualified nontraditional candidates is to target industries that promote the development of transferrable skills.

To help members narrow their recruitment efforts, we analyzed the LinkedIn profiles of nontraditional candidate MGOs. We found that industries such as marketing, entertainment, and finance often produce successful MGOs. Advancement leaders can connect with individuals like these through LinkedIn or at regional events that they frequent.

LinkedIn Profile Analysis of MGOs from Nontraditional Backgrounds

Top Private Sector Industries Represented

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

Most Common Former Employers

Clear Channel, Accenture, Morgan Stanley, State Street, San Francisco Giants, Procter & Gamble

Where to Meet Nontraditional Candidates

- Local Chamber of Commerce meeting
- Regional Rotary Club networking event
- Life insurance sales representative conference
- Gathering of community organizations with volunteer fundraisers
- Keyword skill search in your personal LinkedIn network

Source: EAB interviews and analysis.

Targeting Nontraditional Candidates

Nontraditional candidates pose many challenges for the ambitious advancement recruiter. Yet their pursuit can yield substantial benefits.

Advancement leaders can expand their pipeline of nontraditional candidates through events such as community career forums. Over time, advancement leaders may find that a more targeted, industry-specific approach can also serve their needs.

EAB Next-Step Recommendations

Quick Wins

Invest resources to connect with local talent

Build channels for local talent by offering community career forums

Long-Term Strategies

Use data analysis to create industry map

Target recruitment efforts by focusing on local industries and companies who match key MGO competencies

Source: EAB interviews and analysis.

Study Road Map

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: ______________________________

High

Retention Risk

Low

	Priority II	**Priority I**
		Priority II

Low **Departure Impact** *High*

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.

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.

Education
Advisory
Board

eab.com

2445 M Street NW I Washington DC 20037
P 202.266.6400 I F 202.266.5700