



Competency-Based Hiring Toolkit

Tools for Recruiting Transferable Skills Candidates
to Fundraising Roles

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Identify Necessary Competencies

SECTION

1

Tools

- Brainstorm Key Competencies and Professions
- A Compendium of Transferable Skills

Brainstorm Key Competencies and Professions

Facilitation

Use this exercise to brainstorm necessary skills and relevant professions that qualify a candidate for a vacant position in advancement. Having a clear understanding of necessary skills and professions will assist talent management partners in rewriting job descriptions, conducting candidate searches, and interviewing.

Instructions

- 1 Work in a large group or in small groups if tackling more than one role vacancy.
- 2 As a group(s) discuss relevant skills and professions for your assigned role. Use examples on the next two pages for assistance.
- 3 Select the top ten skills and five professions for your role.
- 4 Share the top skills and professions with the recruiting team so they can screen resumes to find qualified candidates from out of industry.

Roles to consider:

- Major/Principal Gift Officer
- Alumni Relations Director
- CFR Staff
- Planned Giving Officer
- Annual Giving Officer

Role: _____	
1. Skills	2. Professions

Brainstorm Key Competencies and Professions (cont.)

Skills and Competencies Examples

- Active listening skills
- Adaptable
- Administrative skills
- Ambitious
- Analytical
- Artistic
- Assertiveness
- Attention to detail
- Business etiquette
- Business storytelling skills
- Calm under pressure
- Client engagement
- Closing skills
- Coachable
- Collaboration
- Communication skills
- Computer skills
- Conflict management
- Conflict resolution
- Construction
- Contract negotiation
- Courageous
- Creativity
- Critical thinking
- CRM software
- Customer service
- Decision making skills
- Decisive
- Delegating skills
- Donorperfect software
- Editing skills
- Empathetic
- Ethical
- Experience with budgeting
- Flexible
- Goal-oriented
- High energy
- Independent
- Initiative
- Innovative
- Inquisitive
- Integrity
- Interested in learning
- Interpersonal skills
- Intrapersonal skills
- Leadership skills
- Listening
- Meeting facilitation
- Mentor abilities
- Microsoft Excel
- Microsoft PowerPoint
- Microsoft Word
- Motivating
- Multitasking ability
- Negotiation ability
- Networking skills
- Nonverbal communication
- Passionate about selling
- Patience
- Perseverance
- Persuasive
- Planning
- Positive attitude
- Prioritizing abilities
- Problem solving skills
- Product knowledge
- Professional
- Proofreading skills
- Project management skills
- Prospecting skills
- Raiser's edge
- Reasoning
- Referral selling skills
- Relationship building skills
- Research
- Responsible
- Results oriented
- Sales presentations
- Salesforce
- Scheduling skills
- Self-confidence
- Self-management
- Self-motivated
- Sociable
- Social selling abilities
- Storytelling skills
- Strategic planning skills
- Strong work ethic
- SUMAC software
- Teamwork
- Tech savvy
- Tenacious
- Thoughtful
- Time management
- Trustworthiness
- Verbal communication

Brainstorm Key Competencies and Professions (cont.)

Profession Examples

- Accountant
- Accountants and auditors
- Advertising sales
- Agents of athletes
- Announcers
- Athletes
- Athletic trainers
- Barbers
- Bartender
- Biological technicians
- Business teachers
- Buyers and purchasing agents
- Clergy
- Coaches
- Communication workers
- Community service specialists
- Computer support specialists
- Concierges
- Cosmetologists
- Counselors
- Customer relationship manager
- Dental hygienist
- Dermatologists
- Economists
- Editors
- Education Directors
- Elementary school teachers
- Environmental scientists
- Event planners
- Financial analysts and advisors
- Financial examiners
- Flight attendants
- Funeral directors
- Hairstylists
- Hospitality managers
- Human resources workers
- Judges
- Judicial clerks
- Lawyers
- Life coaches
- Lobbyist
- Magistrates
- Management analysts
- Market research analysts
- Mediator
- Medical scientists
- News reporters
- Nurse practitioners
- Physical therapist
- Pilots
- Policy analyst
- Political campaign director
- Postsecondary teachers
- K-12 Principals
- Project managers
- Public relations manager
- Public relations specialists
- Quality Control Managers
- Recruitment consultant
- Retail sales workers
- Sale representatives
- Sales Supervisors
- Research assistants
- Social workers
- Sociologists
- Spa manager
- Survey researchers
- Tax attorney
- Taxi drivers
- Telemarketers
- Tour guides
- Urban and regional planners
- Veterinarians
- Waiters/waitress

A Compendium of Transferable Skills

Instructions

Use the following compendium to identify candidates that may be qualified for a role in advancement but that come from outside of the profession. This compendium was compiled by EAB with input from 200+ advancement leaders.

Alumni Relations Director

Skills	<ul style="list-style-type: none"> • Board management • Communication (written and verbal) • Crisis communication • Leadership 	<ul style="list-style-type: none"> • Marketing • Prioritization • Public speaking • Relationship building
Characteristics	<ul style="list-style-type: none"> • Digitally savvy • Empathetic • Enthusiastic • Flexible • Goal oriented • Innovative • Mature 	<ul style="list-style-type: none"> • Patient • Positive attitude • Respectful • Self-motivated • Sociable • Strategic
Professions	<ul style="list-style-type: none"> • Advertising professional • Athlete • Communications professionals • Counselors • Customer service or relationship manager • Disney staff member • Event planner 	<ul style="list-style-type: none"> • Hospitality professional • Life coach • Lobbyist • Political campaign director • Principal • Public relations professional • Teacher

Annual Gift Officer (external)

Skills	<ul style="list-style-type: none"> • Cold calling 	<ul style="list-style-type: none"> • Communication (written & verbal)
Characteristics	<ul style="list-style-type: none"> • Analytical • Coachable • Active listener • Detail oriented • Engaging • Fearless 	<ul style="list-style-type: none"> • Goal oriented • Inquisitive • Planner • Self-confident • Self-manager • Tenacious
Professions	<ul style="list-style-type: none"> • Admissions counselor • Athlete (themselves or managers) • Canvasser • Market researcher professional • Paralegal 	<ul style="list-style-type: none"> • Political campaign director • Recruiter • Sales (general and real-estate) • Student affairs professional • Telemarketer

A Compendium of Transferable Skills (cont.)

Corporate Foundation Relation Officer		
Skills	<ul style="list-style-type: none"> • Communication (written and verbal) • Critical thinking • Negotiation 	<ul style="list-style-type: none"> • Project management • Time management
Characteristics	<ul style="list-style-type: none"> • Active listener • Adaptable • Analytical • Business acumen • Collaborative • Detail oriented • Diplomatic 	<ul style="list-style-type: none"> • Innovative • Inquisitive • Problem solver • Professionally savvy • Self-confident • Tenacious • Trustworthy
Professions	<ul style="list-style-type: none"> • Career center staff • Community relations professional • Corporate relations professional • Customer service or relationship manager • Faculty (current, former, adjunct) • Foundation staff • Hospitality professional 	<ul style="list-style-type: none"> • Journalist • K-12 administrator • Lobbyist • Major Gift Officer • Market researcher • Non-profit professional • Project manager • Urban or regional planner

Major or Principal Gift Officer		
Skills	<ul style="list-style-type: none"> • Ability to close • Communication (written and verbal) 	<ul style="list-style-type: none"> • Negotiation • Relationship building
Characteristics	<ul style="list-style-type: none"> • Active listener • Adaptable • Calm under pressure • Collaborative • Courageous • Empathetic • Ethical • Flexible • Goal oriented • Innovative 	<ul style="list-style-type: none"> • Inquisitive • Patient • Positive attitude • Problem solver • Self-confident • Self-motivated • Self-starter • Storyteller • Tenacious • Trustworthy
Professions	<ul style="list-style-type: none"> • Admissions counselor • Alumni relations professional • Athlete • Clergy or Pastor • Coach • Teacher (elementary) • Enrollment management professional • Hospitality manager • Journalist 	<ul style="list-style-type: none"> • Life coach • News reporter • Nurse • Political campaign director • Private wealth manager • Recruiter • Reporter • Sales (general and real-estate)

A Compendium of Transferable Skills (cont.)

Planned Gift Officer		
Skills	<ul style="list-style-type: none"> • Ability to prioritize for others • Case planning • Communication (written and verbal) • Contract negotiation • Critical thinking • Discussion facilitation 	<ul style="list-style-type: none"> • Document review • Follow-up • Marketing • Relationship building • Translator of complex ideas into simple ones
Characteristics	<ul style="list-style-type: none"> • Active listener • Analytical • Collaborative • Confidential • Detailed oriented • Integrity • Motivating 	<ul style="list-style-type: none"> • Patience • Problem solver • Sensitive • Social grace • Storyteller • Tenacious • Trustworthy
Professions	<ul style="list-style-type: none"> • Accountant • Clergy or pastor • Financial planner analyst • Hospitality professional • Sales (insurance) professional • Lawyer 	<ul style="list-style-type: none"> • Market researcher professional • Mediator • Minister • Paralegal • Social worker • Trust officer



Attract Candidates With Transferable Skills

SECTION

2

Tools

- Job Description Audit
- Vacancy Announcement Checklist
- Manager Email Blast
- Social Media Referral Campaign Strategy Guide

Job Description Audit

Instructions: Audit institutional job descriptions using the exercise below to attract candidates based on their competencies, not just their prior experience in advancement. Adjust job descriptions to welcome candidates with the appropriate skills from out of industry to increase the number of qualified applicants.

1. Assess requirements

Write down three requirements from the job description. Assess if each is necessary for success and move any that are “not necessary” to preference in the job description. Consider repeating this exercise for all requirements.

Requirement 1: _____

<i>Not necessary, but we always include it</i>	<i>Not necessary, but very helpful to have</i>	<i>This is absolutely required for success</i>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Requirement 2: _____

<i>Not necessary, but we always include it</i>	<i>Not necessary, but very helpful to have</i>	<i>This is absolutely required for success</i>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Requirement 3: _____

<i>Not necessary, but we always include it</i>	<i>Not necessary, but very helpful to have</i>	<i>This is absolutely required for success</i>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Welcome candidates with transferable skills

Evaluate if a job posting encourages applicants with transferable skill to apply by assessing if the phrases below are included. Add phrases that aren’t included to postings so people with transferable skills know they’re qualified. Consider using the Transferable Skills Compendium (p. 7-9) for ideas of relevant professions, or skills after the “such as...” options.

- | | | |
|---|---|---|
| <input type="checkbox"/> “or related experiences” | <input type="checkbox"/> “or related experiences, such as...” | <input type="checkbox"/> “or related professions, such as...” |
| <input type="checkbox"/> “or related skills” | <input type="checkbox"/> “or related skills, such as...” | |

3. Highlight institutional resources

Attract more candidates with the necessary competencies from out of industry by deliberately communicating the benefits of working for a higher education institution. Check off the resources that are included in the job description below. Add benefits that aren't currently included to your institution’s job description.

- | | | |
|---|--|--|
| <input type="checkbox"/> Tuition reimbursement | <input type="checkbox"/> Same sex partner benefits | <input type="checkbox"/> Maternity leave |
| <input type="checkbox"/> Professional development | <input type="checkbox"/> Employee resource groups | <input type="checkbox"/> Paternity leave |
| <input type="checkbox"/> Mission-driven work | <input type="checkbox"/> Equitable pay | <input type="checkbox"/> Flex-time |
| <input type="checkbox"/> Impact-driven work | <input type="checkbox"/> Vacation days | <input type="checkbox"/> Remote work |

Vacancy Announcement Checklist

Instructions

Use the job posting checklist below to ensure advancement is posting vacancies in a systematic way. This will help more candidates see the posting.

Step One

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

Job Posting Checklist

Position: _____ Department: _____ Hiring Manager: _____

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

Manager Email Blast

Instructions

The email template below will help recruit transferable skills candidates from within the institution.

Advancement hiring managers should use the template to ask managers in institutional partner units such as, admissions, athletics, marketing, and student affairs to identify top internal talent for open advancement positions.

Dear Partner Unit,

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

- Communications
- Negotiations
- Critical thinking

Please respond to this email with the names of any internal staff you consider qualified and/or who may need a growth opportunity to be retained by the institution. Thank you in advance.

Sincerely,

[__Name__]

Hiring Manager, Advancement

Social Media Referral Campaign Strategy Guide

Instructions

Social media campaigns can be used to surface top talent in your employee networks. Using a referral campaign to attract transferable skills candidates can establish a level of trust with applicants on behalf of the institution through the referrer.

- 1 Choose Platforms and Networks**
Identify social media platforms commonly used by employees.
- 2 Select Participants**
Decide what institution divisions the program is open to.
- 3 Decide Incentives**
Choose incentives that will drive employee engagement.
- 4 Determine Staff**
Select a staff member to manage the social media referral campaign.
- 5 Marketing and Branding**
Craft compelling materials to attract transferable skill candidate applicants.
- 6 Analytics**
Identify key metrics to track for reporting and to make future data driven decisions.

Step One: Choose Platforms and Networks

Correspond with your human resource (HR) partners to identify which social media platforms that will gain the most traction at your organization and comply with institutional policy. Work with central HR or marketing and communications to ensure you meet all internal social media branding requirements before launching a social media referral campaign.

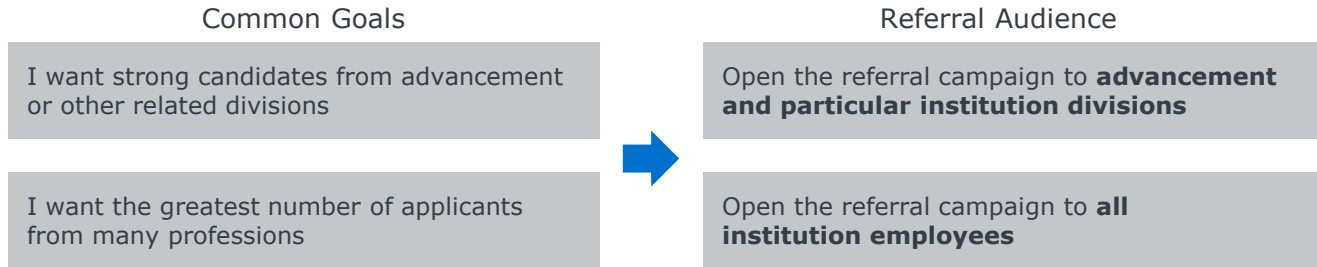
Consider the social media platforms below:

- LinkedIn
- Facebook
- Twitter
- Snap Chat
- Instagram

Social Media Referral Campaign Strategy Guide (cont.)

Step two: Select Participants

Consider the information below to make a decision on which employees from institutional divisions will be invited to participate in the social media referral campaign.



Step three: Decide Incentives

To incentivize employee participation in the referral campaign, consider offering incentive awards. Awards can be given to the entire unit or just to an individual. Consider the incentives below.



Extra time off



Gift cards



Jeans casual



Cash bonus

Step four: Determine Staff

Identify a staff member in the advancement division to serve as the campaign coordinator to support staff and potential candidates. Consider a member from the strategic talent management team or a hiring manager.

Potential Manager	Relevant Skills	Current Duties

Social Media Referral Campaign Strategy Guide (cont.)

Step Five: Branding and Communication

The staff member identified in step four should be responsible for creating the initial email to employees introducing the campaign, the candidate referral email to send to the candidate after they apply, and the employee referrer email that goes to the current employee thanking them for their participation.

Introducing a Candidate Referral Campaign

Dear [insert employee name],

It is with great enthusiasm that the VP for Advancement has announced the launch of an employee referral campaign to attract candidates with transferable skills. As you know, we are about to launch a new campaign and need your help to staff up. Please reach out to people in your network with **skills that could transfer to [insert advancement positions]** and invite them to consider applying online.

The talent management office will track candidates' referrer. The staff member who passes the most leads will receive [insert incentive] and the team that refers the highest amount of candidates will receive [insert incentive].

In two weeks be on the look out for an update with leading units and individuals. If you have any questions, please do not hesitate to contact us at [insert email].

Sincerely,

[Insert name]

Referrals that are submitted during the campaign need to be stewarded effectively. Your HR staff or hiring manager should connect with both the candidate and the referrer within 24 hours of receiving the resume. 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 [insert referrer's name] supported your application. We look forward to reviewing it.

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

Please don't hesitate to reach out with questions.

Thank you,

[insert institution name] HR Team

P.S. Learn more about benefits [here](#)

Employee Referrer Email

Dear Employee,

Just a quick note to let you know that [insert name of candidate] has submitted their resume through the referrals campaign. **They heard of the job through you—way to go!**

We will evaluate the resume against our hiring needs and communicate a decision to you and the candidate in the coming weeks.

Please don't hesitate to reach out with questions

Thank you,

[insert institution name] HR Team

Social Media Referral Campaign Strategy Guide (cont.)

Step Six: Analytics

A social media referral campaign is only as strong as the candidates it surfaces. To evaluate and improve future referral campaigns, track the following KPIs for each campaign completed.

	Key Performance Indicator
Internal	Percent of units that participated
	Percent of employees that participated
	Percent of employees that participated from other units
	Average tenure of employees with at least one referral
Outreach	Percent of applicants through LinkedIn
	Percent of applicants through Twitter
	Percent of applicants through Facebook
	Percent of applicants through other
Candidates	Average years of work experience
	Percent of referrals given at least one interview
	Percent of referrals given an offer
	Percent of referrals that accept an offer
	Percent of final interviewees from referral program
	Percent of referred candidates from out of industry



Interview Candidates for Competencies

SECTION

3

Tools

- Candidate Concierge Launch Guide
- Candidate Prewire Email Template
- Interview Evaluation Matrix Competency Assignments
- Staff Prewire Email Template
- Competency Question Bank
- Reference Check Question Bank
- Star File Excel Spreadsheet

Candidate Concierge Launch Guide

Instructions

Designate a candidate concierge in your office to serve as the primary point of contact for candidates interviewing. This person should guide each candidate through their interview process while highlighting selling points of the institution that candidates from out of industry may be unaware of.

Step 1: Select a Candidate Concierge

Consider who would have the time and be a good fit for the candidate concierge position. Ideally, this individual would have a few free hours a week to dedicate to this position and not travel regularly. A few possibilities could be an administrative assist, a graduate student intern, or a human resources liaison.

Name of candidate concierge: _____

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

Step 2: Identify Candidate Contact Points

Make a list of all interactions that your institution has with a candidate over the course of their in-person interview process in the "Interaction" column below. Next, identify who holds the current responsibility and consider if the candidate concierge should take over that interaction. For interactions that the candidate concierge is taking over, list action steps to complete the transition in the last column.

Interaction	Current Person Responsible	Move to Candidate Concierge	Action Step Required to Transfer to Concierge
Arrival Greeting	Front Desk	Yes	Determine a meeting spot for the candidate concierge and candidate to first meet.

Candidate Concierge Launch Guide (cont.)

Step 3: Create a Go-To List of Selling Points

Build a quick reference list of selling points to refer to when interacting with candidates. Organize the list by interest to quickly pair selling points to the candidate's interests. Demonstrating the selling points of working in higher education is critical when interviewing candidates from out of industry because they may be less familiar with industry benefits.

Use the table below to organize selling points and keep it in a central location so other individuals included in the hiring process can reference it as needed when talking to a candidate.

Interest	Selling Points
Sports	<ul style="list-style-type: none">• <i>Example: free tickets to institutional sporting events</i>
Learning	<ul style="list-style-type: none">• <i>Example: Attending online classes</i>

Interest	Selling Points

Candidate Prewire Email Template

Instructions

The email below serves as a template to inform candidate interviewees about their time on campus or interviewing online. Clearly communicating this information will make candidates from out of industry feel welcome and comfortable if they have to navigate a complex campus.

Dear Candidate,

We look forward to welcoming you next week. Please review and make yourself familiar with the following schedule. If you have any questions, please let me know. I am looking forward to greeting you on [insert time] on [insert date] in the [insert location].

Day One: [insert date]

- *Flight reservation information: airports, departure and arrival time, reservation number*
- *Car rental Information or airport pickup details*
- *Hotel check-in information including check-in time, reservation number, and hotel address*
- *Dinner reservation information including restaurant name and the name and titles of other attendees*
- *Conference line information for virtual interviews*

Day Two: [insert date]

- *Concierge campus welcome, time, location, name, title*
- *Time, location, names and titles of interviewers*
- *Lunch reservation information with attendee information*
- *Campus departure information including time and car rental return information*
- *Departure flight information including airport, departure and arrival times, and reservation number*
- *Conference line information for virtual interviews*

We hope you enjoy your time with our team. Of course, please do not hesitate to contact our office if we can be of any help at [insert phone number] or at [insert email].

Kind regards,
[Name, Title]

Interview Evaluation Matrix Competency Assignments

Instructions

Hiring managers should use the evaluation matrix designed by Massachusetts Institute of Technology's Resource Development team to ensure all interviews are useful in assessing a candidate's competencies.

Use the matrix below to help coordinate which interviewer will assess the various competencies a candidate must have to succeed in the role. After completing the matrix, hiring managers can use the email template on the next page to communicate with interviewers what competencies they should assess.

	Competency _____	Competency _____	Competency _____	Competency _____	Competency _____
Name: <i>John</i>		✓		✓	
Name: _____					
Name: _____					
Name: _____					
Name: _____					
Name: _____					
Name: _____					

Staff Prewire Email Template

Instructions

Use the email template below to prepare interviewers. Sending an email prior to the candidate's interview will assist interviewers with assessing the pre-assigned competencies.

Consider having the candidate concierge or hiring manager send the email.



Hazel University Foundation Interview Preparation Email

Candidate: [fill in name]

Interview Date: [fill in date]

Interview Schedule

Time	Key Focus Competencies	Staff Attendees

Attach you will find the candidate's resume, a feedback form, and the competency question bank. We look forward to reviewing your feedback on the candidate.

Competency Question Bank

Instructions

Hiring managers, interviewers, and recruiters should use the competency question bank below, designed by Massachusetts Institute of Technology's Resource Development team. During interviews, individuals conducting the interview can use the questions below to assess particular competencies outside of fundraising.

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.	<ul style="list-style-type: none"> Describe a time when you demonstrated dependability under difficult circumstances. Give me an example of a time when you demonstrated a sense of urgency around getting results. 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.	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> 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.

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.	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> 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.

Competency Question Bank (cont.)

Competency	Definition	Sample Questions
Cultural Sensitivity	Values diversity; creates an inclusive environment; sensitive to other cultures; aware of personal impact on others.	<ul style="list-style-type: none"> • 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?
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.	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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."	<ul style="list-style-type: none"> • 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?

Competency Question Bank (cont.)

Competency	Definition	Sample Questions
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.	<ul style="list-style-type: none"> 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 success.
Partnering	Identifies opportunities for synergy across functions; uses informal and formal networks to accomplish task; works to achieve the common goal; promotes cohesiveness.	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> 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 a time you proactively learned 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.	<ul style="list-style-type: none"> Describe a situation where you had to manage multiple projects at one time. How did you determine priorities? 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? What criteria or process have you used to allocate people, financial, or other resources to projects or getting work done?

Competency Question Bank (cont.)

Competency	Definition	Sample Questions
Risk Taking	Shows evidence of calculated risk with favorable outcomes; does not "bet the farm."	<ul style="list-style-type: none"> 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. How did you 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?
Stress Management	Maintains stable performance under heavy pressure; multitasks various serious impact issues at once.	<ul style="list-style-type: none"> What conditions in your work have been the most stressful for you? 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.	<ul style="list-style-type: none"> Describe a time when you did something to show team spirit and it influenced 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.	<ul style="list-style-type: none"> Sometimes it is difficult to know when to quit. Describe an experience in which you were too persistent or not persistent enough. 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?

Reference Check Question Bank

Instructions

Use this resource to ensure consistency across all candidates when doing reference checks. Use the template below to help hiring managers select questions that they can ask references. Providing a question bank will ensure consistency across candidates regardless of fundraising experience.

Sample Reference Check Question Document

Position: _____

Date of Interview: _____

Department: _____

Candidate Name: _____

Hiring Manager: _____

Interviewee Name: _____

Relationship to Candidate: _____

Previous Experience Questions

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

Growth Opportunity Questions

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

Star File Excel Spreadsheet

Instructions

Keep track of qualified candidates to help advancement have a constant flow of prospective applicants when a vacancy becomes available. Consider tracking candidates that didn't accept an offer, made it to the final interview round, or that were qualified for another job in advancement, but not the one they originally applied to.

The table below is an example of the excel tracker file that can be found digitally [here](#).

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

Download the Excel Star File Tracker

Use this [link](#) to access an Excel version of the star file spreadsheet. Make sure to save the complete star file tracker in a central location for HR partners to access and contribute to.



Accelerate Time to Productivity

SECTION

4

Tools

- Perfecting the First 180 Days

Perfecting the First 180 Days

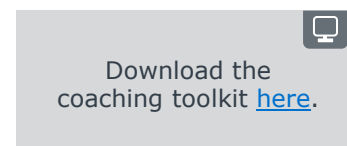
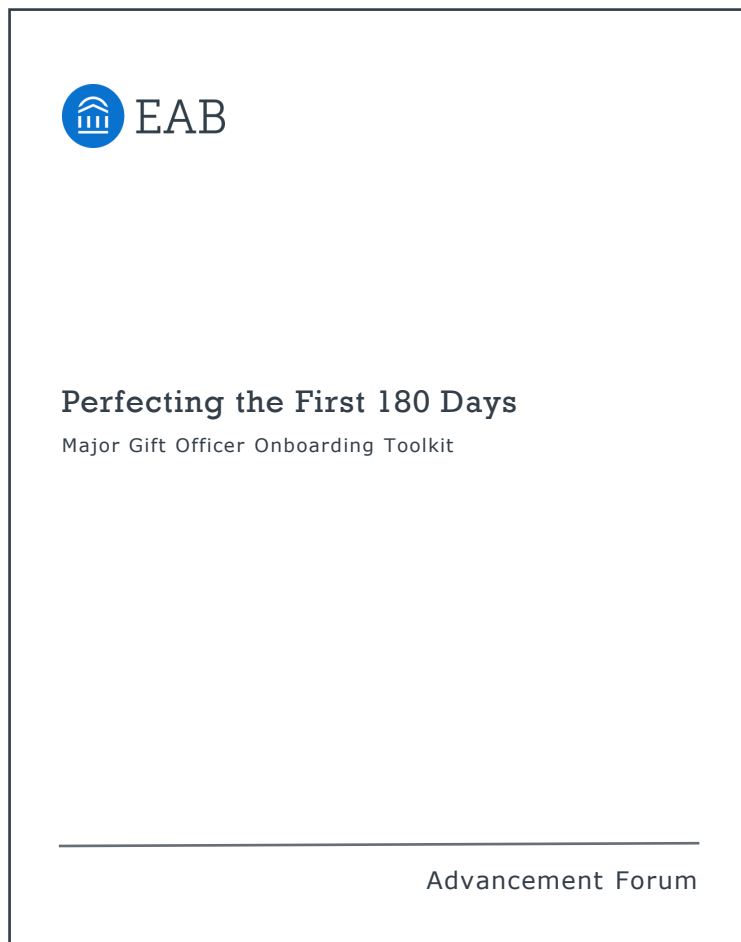
Major Gift Officer Onboarding Toolkit

The Importance of Onboarding

The success or failure of new MGOs is often determined within their first 90 days on the job. An institution's onboarding process can enable new hires to quickly adapt, learn, and see results. However, one-size-fits-all onboarding processes do not enable new hires to gain the skills they need to succeed. A recent survey found organizations with strong onboarding practices in place have a 25% higher retention rate.¹ Updating onboarding procedures can:

- Help new hires gain skills and competencies needed for success, regardless of their level of experience
- Enable MGOs to get on the road and make asks sooner
- Build stronger relationships with new MGOs, leading to higher retention rates

This toolkit provides resources to create an onboarding process that fits the needs of your institution.



Advancement Forum

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