



Closing Advancement's Diversity Gap By Recruiting Transferable-Skills Candidates

A Guide to Competency-Based Hiring

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Advancement's DEIJ Hiring Imperative

SECTION

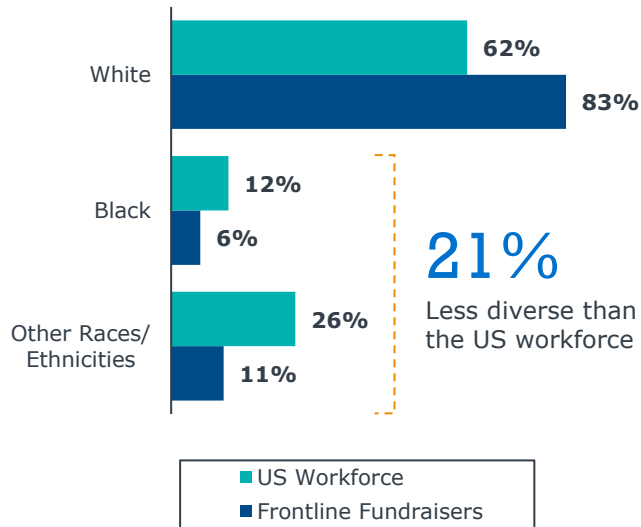
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Today's Talent Strategy is Not Enough

Fundraising Lacks BIPOC Talent More Than Other Industries

Front Lines Notably Homogenous

Fundraiser Diversity, 2019



“

“One of our key **priorities is diversifying our advancement team.** It’s challenging, especially in our location. We, like many, are struggling, but we’re dedicated to doing it.”

*Margot Biggin,
Executive Director of
University Advancement
Tufts University*

”

Advancement’s frontlines are notably homogenous. Fundraising is 83% white—which is about 21% less diverse than the overall US workforce. During the 60+ research conversations EAB conducted on this topic, diversifying the workforce came up repeatedly as a top priority for advancement leaders. Simply put, current efforts aren’t enough to significantly increase diversity of job candidates and new hires.

Demographics Still Outpacing Us

Advancement's Diversity Gap Will Continue to Grow if Status Quo Persists



Donors Begin to Expect Fundraiser Diversity

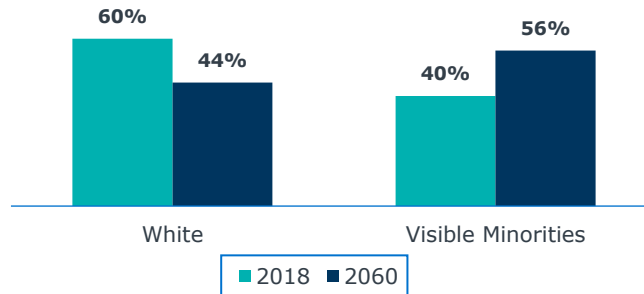
"Out of our 30 gift officers, none are Black. Only one is Asian-American. Demographically, our student population is now majority-minority. **Donors are starting to notice and ask why our fundraisers don't look like our students.**"

*AVP Development,
Private Research University*



The US 2060: A Majority-Minority Country

Demographic Projections



Diversity North of the Border

16.25M

Individuals in Canada who identified as being part of a visible minority group

32%

Of the Canadian population will belong to a visible minority group in 2031

Currently, advancement teams are out of sync with the demographics of students and young alumni. Unless deliberate action is taken to increase fundraiser diversity, advancement's diversity gap will continue to grow due to an increasing percentage of BIPOC individuals in the general population. By 2060, the US will be a majority-minority country. By 2031 in Canada, 32 percent of the population will belong to a visible minority group, which is double the current percentage.

Increasing fundraiser diversity is a business imperative because if fundraisers do not look like their constituents, it will be difficult to build relationships, solicit gifts, and meet ever-ambitious campaign goals. Chief advancement officers must proactively respond to donor expectations of fundraiser diversity, especially as socially conscious millennials age into prime giving years.

Source: Cunningham, Sue. "Letter to the Editor." *The Chronicle of Philanthropy*, April 18, 2016. <https://www.philanthropy.com/article/Letter-to-the-Editor-Fox/236151>; Statistics Canada. "Ethnic Diversity and Immigration." *Canada*, January 17, 2018. <https://www150.statcan.gc.ca/n1/pub/11-402-x/2011000/chap/imm/imm-eng.htm>; Frey, William. "The US Will Become 'Minority White' in 2045, Census Projects." *Brookings*, March 14, 2018. <https://www.brookings.edu/blog/the-avenue/2018/03/14/the-us-will-become-minority-white-in-2045-census-projects/>; Advancement Forum interviews and analysis.

Transferable-Skills Candidates (TSCs) Offer a Solution

Out-of-industry Talent Can Help Close Advancement's Diversity Gap

Characteristics of a TSC

- ✓ Has skills and abilities necessary to be a successful fundraiser
- ✓ Has behavioral characteristics to be a successful fundraiser
- ✓ Provides new ideas and challenges the status quo
- ✓ Provides access to new professional networks and resources
- ✗ Lacks Fundraising Experience

Sizing Potential Talent Pools

Financial Managers

26.1%

Identify as non-white

Sales

32.6%

Identify as non-white

Foundation Program Officers

35.0%

Identify as non-white

Transferable-skills candidates (TSCs) bring skills and competencies from related fields that can make them a great fit for a fundraising position. Some transferable skills include marketing, public speaking, relationship building, negotiation, and project management.

Importantly, TSCs provide a potential opportunity to increase advancement team diversity. Several related professions, such as financial managers and sales associates, have promisingly diverse talent pools from which advancement leaders can recruit. Systematic out-of-industry recruitment is a way to not only attract more BIPOC candidates but gain the perspective of individuals with contrasting professional background.

Transferable-Skills Compendium

Don't know where to start? Use the [Compendium of Transferable Skills](#) to learn what skills 200+ advancement leaders seek in out-of-industry candidates.

Source: "Labor Force Statistics from the Current Population Survey." *Bureau of Labor Statistics*, 2017. <https://www.bls.gov/cps/cpsaat11.htm>; Brown, Alisson. "The State of Diversity in the Nonprofit Sector." *Community Wealth Partners*, May 12, 2015. <http://communitywealth.com/the-state-of-diversity-in-the-nonprofit-sector/>; Advancement Forum interviews and analysis. eab.com

'A Lucky Find' Will Not Lead to a Pipeline of TSCs

Happenstance is Not a Sustainable Strategy for Sourcing Out-of-Industry Talent

One-Off Hiring Examples Highlighted in EAB Research Interviews



Political campaign director



Software salesperson



Finance portfolio manager



Corporate responsibility director



Real estate agent



Bartender at local restaurant



Lobbyist working at state capitol



Lawyer downsized from corporate role

“One of our most talented fundraisers was a political campaign director before coming here. I connected with her because our kids were in the same class. **I am definitely open to hiring non-traditional candidates but we aren't doing anything specific to find them.**”

*Chief Advancement Officer
Public Research University*

Many shops already have out-of-industry staff that “fell” into advancement from another role. These happenstance situations that bring TSCs into advancement are beneficial since TSCs can infuse fresh perspective to the fundraising role. However, relying on “lucky finds” will not lead to a consistent pipeline of TSCs since one-off hires usually arrive due to unique circumstances.

Instead, advancement shops should deliberately integrate TSC recruitment into their overall BIPOC recruitment strategy. The next section explores how to navigate roadblocks in recruiting TSCs.



Navigating Recruitment Roadblocks

SECTION

2

Even the Playing Field for TSCs

Competency-based Hiring Helps Attract, Find, and Hire TSCs

Traditional Hiring Looks For...

Experience with developing rapport with **prospective donors**

Skills to work with **trustees** and trustee institution partners

Involvement in **managing alumni, donors**, and academic relationships

Ability to **secure major and principal gifts** from donors



Competency-based Hiring Looks For...

Experience with developing rapport with **prospective clients**

Skills to work with **advisors** and executives

Involvement in **managing a variety of stakeholder** relationships

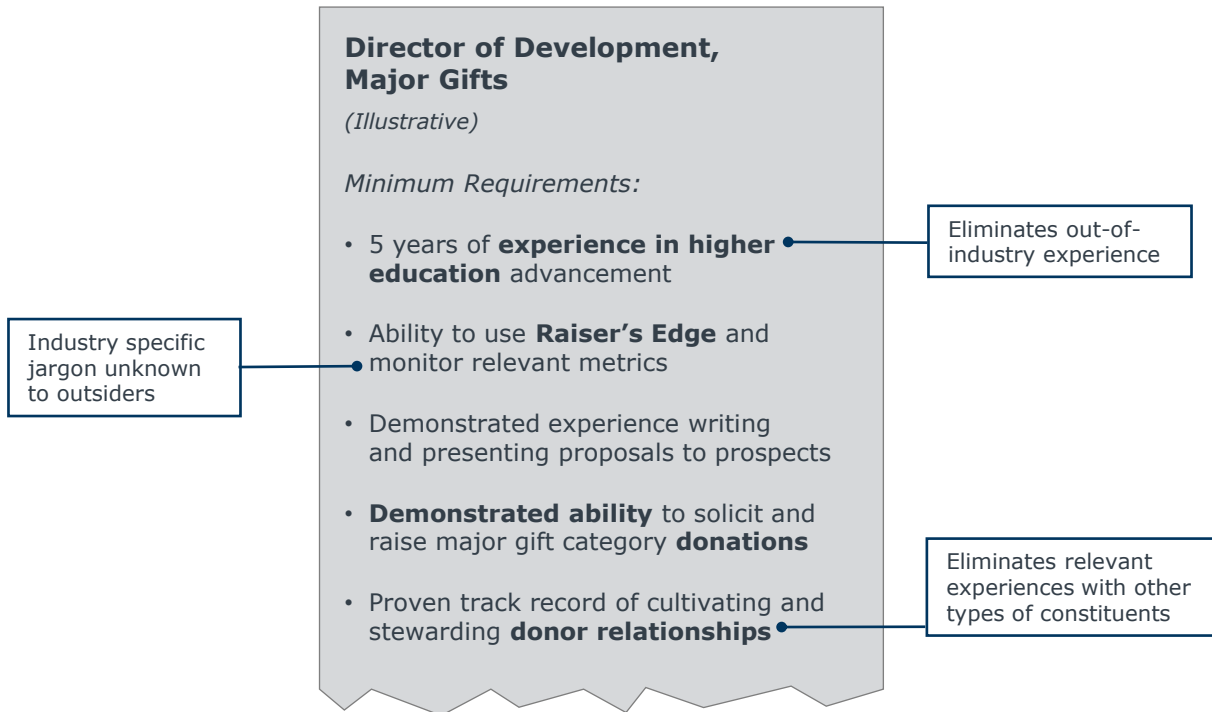
Ability to **secure commitments** from top stakeholders or clients

Most search committees across the advancement industry consider candidates' ability to succeed in a roll by inquiring about prior fundraising experience. This reliance on fundraising experience means that qualified TSCs are denied the opportunity to demonstrate their competencies throughout the hiring process.

Instead, search committees should focus on competency-based hiring to assess a candidate's competencies without relying on specific fundraising experience. This next section explains how to engage transferable skills in competency-based hiring processes.

'Why Should I Bother Applying?'

Job Descriptions Exclude Transferable-Skill Hires



Industry-specific and experience-heavy job descriptions make it impossible for out-of-industry candidates interested in advancement to qualify for a fundraising role. Advancement shops unintentionally turn qualified candidates away by posting exclusionary looking job postings on sites like LinkedIn.

Attracting candidates with transferable skills to advancement begins by rewriting exclusive statements to make job descriptions more inclusive of candidates with transferable skills.

Job Description Audit

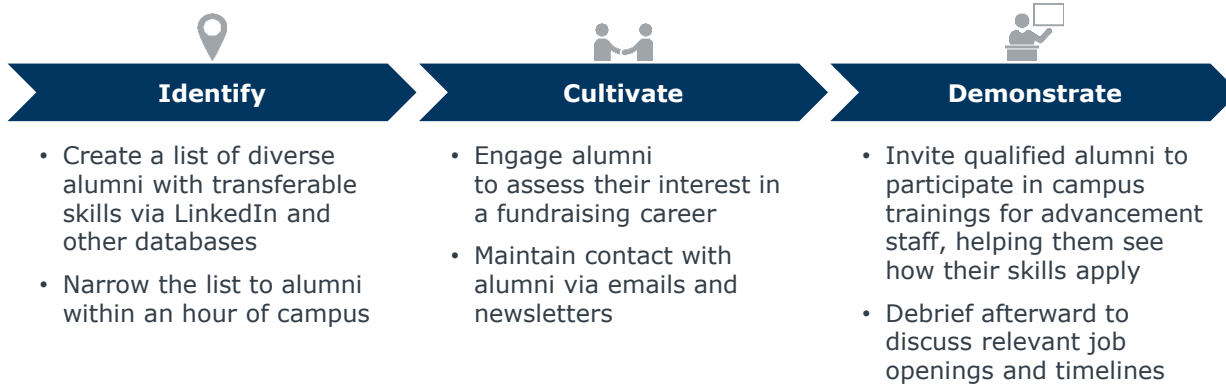
Use the [Job Description Audit](#) to modify job postings to focus on competencies so that out-of-industry hires see themselves in the posting.



Source: Advancement Forum interview analysis.

Use Development Tactics to Source Diverse TSCs

Rutgers University Proactively Cultivates Alumni Like They Are Donors



Using the Development Playbook on Candidates



"I treat recruiting diverse individuals like a donor visit. **I literally copy the development playbook and apply it to diverse prospective candidates.** I go visit them and build a close relationship with them. After I get to know them personally, it's easier to invite them to apply for a job opening that they will be the perfect fit for."

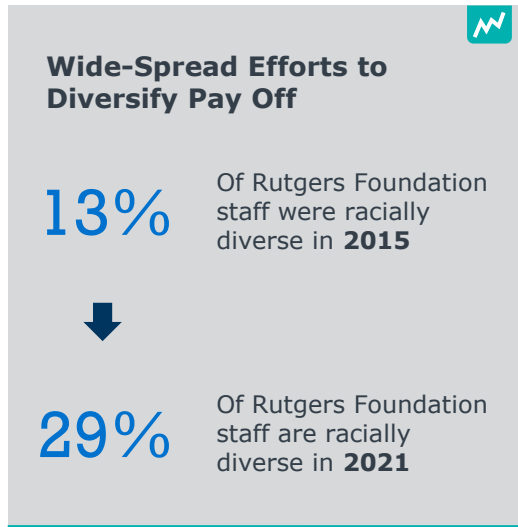
*Tahsin Alam
Associate Vice President, Talent Management and Organizational Development
Rutgers University Foundation*

Rutgers University systematically finds qualified TSCs by cultivating alumni from outside the advancement industry. Talent management aims to develop a pipeline of diverse out-of-industry frontline fundraisers.

The talent management team builds a pipeline of candidates using a three-step process that is similar to cultivating a donor. This Rutgers program has shown promise in creating a fruitful pipeline of qualified BIPOC candidates.

Moving the Needle on Staff Diversity

Rutgers More Than Doubles BIPOC Representation in Advancement



Making It Work on Your Campus

- Look for candidates working in professions with high racial diversity
- Ensure your interview process evaluates skills, not prior experience
- Focus on central advancement roles rather than ones based in academic units

By systematically recruiting TSCs using development tactics, Rutgers is significantly moving the needle on staff diversity. BIPOC individuals made up 13% of their staff in 2015 and they increased that number to 29% in 2021. After a hiring freeze during the early days of the COVID-19 pandemic, Rutgers has recently begun hiring again and 100% of their new hires have been BIPOC individuals.

Competency-based Hiring Toolkit

- Use EAB's Competency-Based Hiring Toolkit Online [Here](#)



Source: Advancement Forum interviews and analysis.

Look for Talent in Your Own Backyard

Michigan Technological University's Cross-Campus Recruiting Process

Right Here on Campus

“There are incredibly bright, energizing, and excited people in student affairs. They know how to **build meaningful, long-term relationships**. But more importantly, they already have a **very broad understanding and knowledge of the campus**, university initiatives, and internal politics. This combination makes for a great gift officer.”

*Les Cook
Former Vice President for Student Affairs and Advancement,
Michigan Technological University*

1

Identify Units with Transferable Skills

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

2

Understand Best-Fit Candidate Profiles

- Have outgrown their current position
- Have shown interest in advancement
- Individuals with whom the CAO or AVPs have an established relationship

3

Ensure Transparency Across Units

- Raise internal awareness of openings by advertising broadly
- Proactively ask other VPs about individuals who may leave campus to advance their careers
- Assess potential candidates' interest informally before moving forward

To find qualified TSCs, Michigan Tech looks to other university divisions. These non-fundraisers are identified respectfully and transparently. Advancement staff discuss growth opportunities for individuals with other division leaders and the qualified candidates themselves.

Individuals in other divisions often find advancement appealing because they lack career opportunities in their current division. Advancement can provide them an avenue to remain at the university and continue growing professionally.

'A Win for the Entire Institution'

Michigan Tech Advancement Sees Success from Internal Recruiting Efforts

Results By The Numbers

55%

Of current gift officers were internal hires from other divisions

7 years

Average gift officer retention

2 weeks

Average onboarding for internal hires



Benefits of Internal TSC Hires

- New gift officers already have broad knowledge of university initiatives and culture
- Individuals can leverage existing campus and stakeholder relationships in their new fundraising roles



Benefits for Advancement

- Keeps top talent at the university and in the local community
- Breaks down institutional silos and promotes increased collaboration across campus divisions

Recruiting TSCs from within has been wildly successful for Michigan Tech. Not only have most of their current frontline fundraisers come to advancement from other professions, but they have remained in advancement for an average of seven years.

Recruiting on-campus staff is an inexpensive and reliable way to build a pipeline of TSCs and retain top university talent.

Interviewing TSCs is a Two-Way Process

Georgia College Ensures a Mutual Fit During Interviews with TSCs

Key Elements in Georgia College's Competency Based Interviews



Confirm that the candidate has the skills to succeed in the position

Discuss an achievement from a previous position that indicates you will thrive in this position.



Assess if they enjoy traveling and meeting people

*What things do you not like to do?
What drains your energy?*



Ask questions to ensure they're curious and enjoy learning

Tell me the last interesting thing you learned that surprised you.

Selling Your Institution

"You need to be able to assess a candidate for fit, 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 them to assess you and your institution.**"

*Jon Derek Croteau
The People First Approach*

Georgia College realized that they needed to go beyond typical interview questions with TSCs. To ensure the role is a good fit, the team asks candidates workstyle questions to ascertain whether the position is sustainable for the individual. Asking these types of questions also allows advancement staff to educate out-of-industry candidates about the day-to-day life of a fundraiser.

After discussing workstyle, interviewers sell the institution to the candidate. Out-of-industry candidates are not as familiar with the benefits of working in higher education, so this is a necessary recruitment step.



Interview Implementation Resources

Use the [Competency Question Bank](#) section of the toolkit to interview candidates and sell the institution to the candidate.

Source: Derek Croteau, Jon. "The People First Approach," CASE, 2009; Advancement Forum interviews and

Minimizing TSC Recruitment Roadblocks

Key Questions and Action Steps

Discussion Questions for Advancement Leaders

- 1 What are the core competencies needed for TSCs to succeed in fundraising roles at your institution?
- 2 Who is the best person in your shop to lead efforts for recruiting TSCs?
- 3 What existing university networks can you leverage to connect with diverse individuals around job openings in advancement?

Next Steps for Recruiting Partners

Short-Term

- Audit job descriptions to identify language and minimum requirements that might deter TSCs from applying
- Revise select job postings to broaden minimum requirements and/or signal an openness to TSC applicants

Long-Term

- Identify strategies to systematically source TSCs
- Determine how to fairly assess TSCs' skills and experience during the interview process

Many institutions unintentionally turn away TSCs by indicating that only those with fundraising experience will be considered. However, advancement leaders who desire a robust pipeline of diverse fundraisers should welcome and attract out-of-industry talent.

Institutions that successfully maintain a diverse pipeline of fundraisers ensure that their job descriptions are inclusive of transferable skillsets. They also proactively recruit TSCs and adjust interviews to fairly assess candidates' potential.



Accelerating Time to Productivity

SECTION

3

Onboarding Is ‘Make or Break’ for New Hires

Yet Few Organizations Invest in Robust Processes

Endorsed by Experts...

Forbes
Employee Onboarding Strategies Have a Longer Lasting Impact Than You Think

Harvard Business Review
Your New Hires Won't Succeed Unless You Onboard Them Properly

Confirmed by Data...

77%

Of new hires who hit their first performance milestone had formal onboarding training

69%

Of employees are more likely to stay with a company for three years if they experienced great onboarding

...But Adoption Lags

20%

Of new hires leave within the first 45 days if there is no onboarding

22%

Of US organizations have no formal onboarding processes in place for new hires

At most organizations, onboarding is an afterthought – even though data indicates that new hires who complete formal onboarding are more successful and remain longer in their positions.

New hires who are not afforded a formal onboarding process may feel unwelcomed and unprepared to succeed in a new position. This lack of onboarding may result in new hires leaving before they have a chance to contribute to the institution.

Advancement leaders should develop a holistic onboarding process, or they risk losing the investment they made in recruiting TSC into fundraising roles.

Source: Marino, Christine. "18 Jaw-Dropping Onboarding Stats You Need to Know." *Click Boarding*, January 13, 2016. <http://blog.clickboarding.com/18-jaw-dropping-onboarding-stats-you-need-to-know>; Solar, Aris. "Infographic The Onboarding Statistics You Need to Know." *Urban Bound*, January 16, 2015. <https://www.urbanbound.com/blog/onboarding-infographic-statistics>; Advancement Forum interviews and analysis.

Not Just a New Job, But a Career Change

Standard Onboarding Doesn't Address Top-of-Mind Issues for TSC Hires



More Misses than Hits

"We struggle with bringing in out-of-industry hires. I believe this is because they don't have the correct training during onboarding to succeed. **When they fail in their role it's us failing to onboard them properly.**"

*Associate Vice President, Development
Public Research University*



Unique Challenges For Out-of-industry Hires

New Role



Difficulties adapting to travel expectations



Trouble adjusting to new donor relationships and long cultivation cycles



Struggle to connect with new peers and find common ground

New Career



Doubt and anxiety about their career change decision



Underestimating the steep learning curve



Difficulties adapting to the pace and culture of higher education

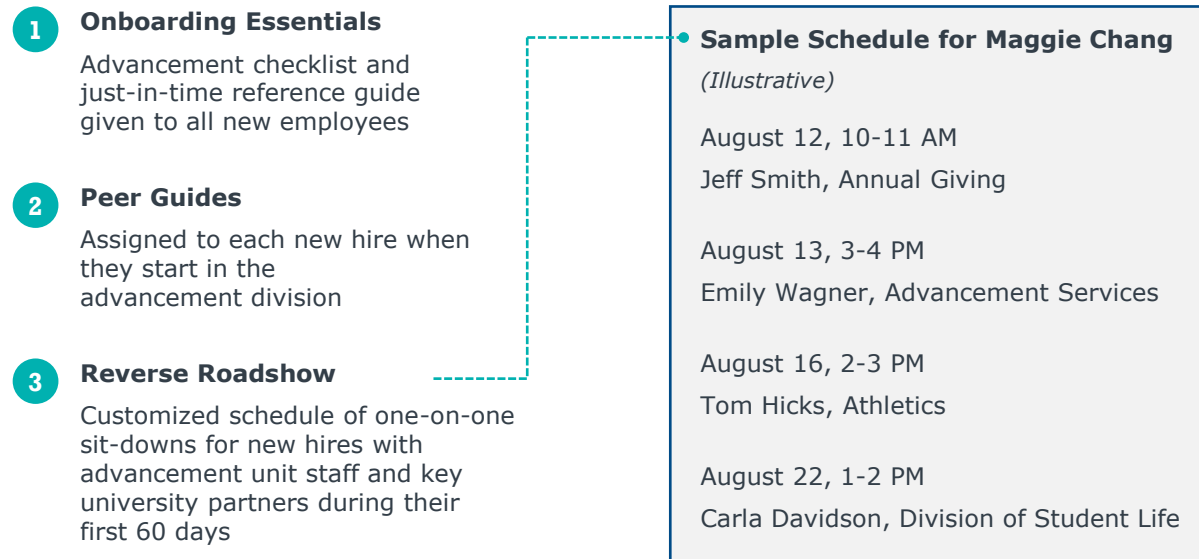
Formal onboarding leads to quick success for many new hires, but advancement shops often do not invest in it. Traditional new hires who have fundraising experience often become productive team members despite a lack of formal onboarding. However, TSC hires require onboarding from day one if leaders expect them to succeed and contribute to the bottom line.

In this section, we discuss how some institutions have helped TSCs quickly adapt their skills and abilities to become successful fundraisers.

Build a Support Network to ‘Hit the Ground Running’

Stony Brook’s Multi-faceted Program Helps Out-of-industry Hires Thrive

A Robust Start for New Advancement Employees



To make onboarding more robust, Stony Brook University’s talent management partner added a reverse roadshow component to the first 60 days of onboarding. This third component of onboarding compliments the first two and quickly develops the new hires’ understanding of advancement. Understanding advancement is critical for out-of-industry staff who are unfamiliar with the innerworkings of fundraising.

Stony Brook’s onboarding process goes one step further by having new hires meet with staff from outside of advancement to establish collaborative relationships with campus partners.

Lay the Foundation for Success

Benefits for New Transferable-Skills Hires and the Advancement Division

Feeling Supported from the Start

“We knew that **we had to get new hires what they needed early to feel supported and be successful from day one.** After implementing the new onboarding practices we got great feedback from new hires on how much they like meeting every unit and how they felt supported.”

*Liz Fox
Human Resource Business
Partner, Advancement
Stony Brook University*



Benefits for New Transferable-Skills Hires



- Helps new hires quickly understand what each advancement unit does
- Allows new hires to make connections with colleagues across campus during their first few months on the job
- Demonstrates how the new role connects to different units and broad university priorities
- Frontloads critical conversations about mission and impact

Benefits for Advancement Leadership



- Shares onboarding responsibility among multiple individuals
- Develops relationships between advancement and campus partners
- Gives new hires context about how their specific role fits into the institution
- Provides various channels to get questions answered

Stony Brook University’s reverse roadshow supports new hires in acclimating to the advancement division. They quickly understand unit roles and who to contact for questions about various units. With a strong foundation, out-of-industry new hires can quickly accelerate their time to productivity.

For advancement managers, the reverse roadshow spreads the burden of onboarding transferable-skill hires. Managers can depend on colleagues and do not need to assume sole responsibility for onboarding out-of-industry hires.

Find the Missing Pieces of the Puzzle

Diagnose Skill Gaps and Customize Training for Out-of-Industry Hires

Iowa State University Foundation’s Onboarding Plan



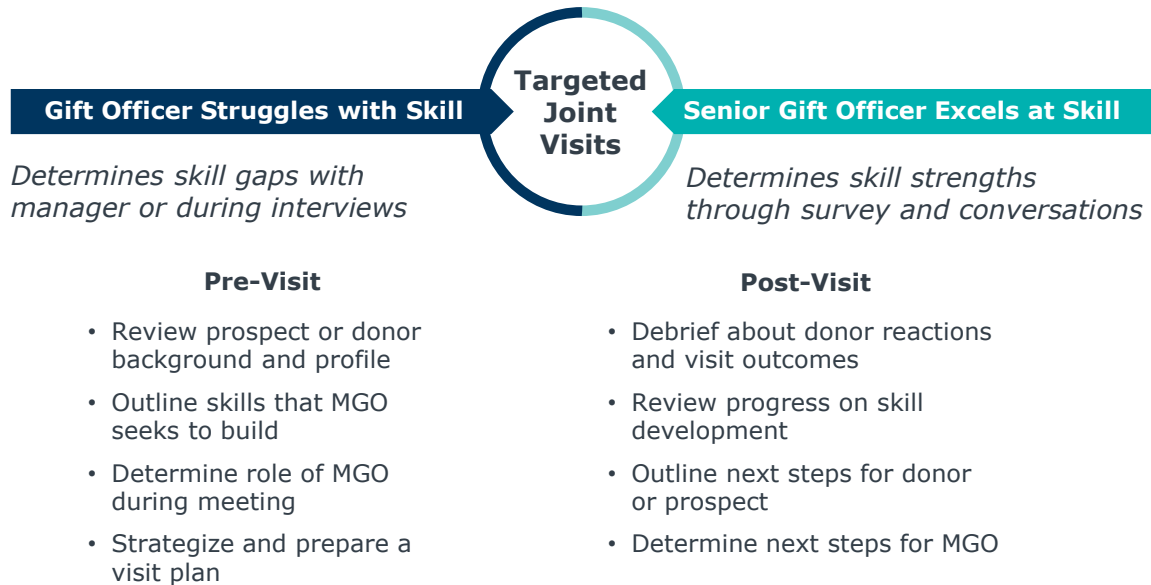
| Example Onboarding Plan | | | | | | |
|--------------------------------|-----------------------------------|---|-----------------|-----------------|--------------------|------------------------|
| Skill | Session Title | Description | Timeline | Priority | Venue | Time Allocation |
| Closing Gifts | Effective Solicitation Strategies | “How to solicit a donor...” | 30-60 days | A | In-person session | Attend one session |
| Pipeline Development | N/A | “Developing and deepening your pipeline...” | 30-60 days | A | Supervisor Meeting | Attend four meetings |

The Iowa State University Foundation uses a targeted approach to onboard new hires. Managers determine specific skill gaps that each new hire has and use foundation-wide templates to establish a personalized onboarding plan.

The onboarding plan helps managers prioritize skill development, set expectations for each new hire, and establish a timeline for learning opportunities. The detailed onboarding plan supports new hires without overwhelming out-of-industry fundraisers.

Build Skills While on the Road

The Missouri University of Science and Technology Incorporates Peer Shadowing



The Missouri University of Science and Technology expedites the time to productivity by having new hires partake in joint visits with experienced gift officers. Joint visits help new transferable-skill hires understand how to apply their current skill set to advancement.

Managers find that this tactic allows new hires to observe various styles and fundraising strategies, so the new hire can both emulate best practices and develop their own unique style.

Accelerating Time to Productivity

Key Questions and Action Steps

Discussion Questions for Advancement Leaders

- 1 How can you adapt current onboarding initiatives to include tailored content for out-of-industry hires?
- 2 Who is the best person in your shop to lead efforts for onboarding transferable-skills hires?
- 3 Which individuals are good candidates for participating in shadow opportunities?

Next Steps for Recruiting Partners

Short-Term

- Audit current onboarding initiatives from the perspective of TSC hires
- Brainstorm ways to address unique challenges facing out-of-industry hires within the context of current onboarding initiatives

Long-Term

- Assess whether it makes sense to create dedicated onboarding modules for out-of-industry hires
- Determine how to obtain feedback and assess out-of-industry hires' experience of the onboarding process

Many advancement shops struggle to ensure that new hires feel supported, especially when onboarding out-of-industry hires. Advancement leaders must allocate time for talent management partners to onboard new hires properly so that their investment in new fundraisers has a sufficient ROI.

Institutions that successfully accelerate time to productivity do so by implementing support systems from day one, using diagnostics that pinpoint specific skill development, and providing real-world training.



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