



Questions to Guide Hiring for Advancement Positions

One of the most challenging positions to recruit and retain is that of vice president for advancement. Hiring and retaining other members

of the advancement team can also be challenging. Competition for these professionals is fierce. The number of qualified and experienced individuals available is often limited. The leadership qualities and experience of this vice president will influence your institution's ability to attract and retain a strong advancement team. Most importantly the vice president for advancement directly impacts the institution's fundraising success.

The following questions can impact the success of the human resources department in supporting the recruitment, hiring and retention of top quality fund development and fundraising professionals.

Questions for the president/chancellor when recruiting a vice president for advancement

1. What do you want your fundraising legacy to be?
2. What are your goals and objectives regarding fundraising for the institution?
3. Has a fund development plan been created and approved to guide the work of the advancement department, board members and others in meeting the institutions fundraising goals?
4. What are your skills and experience in managing and evaluating advancement staff? Can our department provide you with coaching resources for this specific area?
5. What are your expectations of the vice president for advancement?
6. What priority do you place on fundraising?

Questions for the vice president of advancement when working to recruit advancement staff

1. What strategies are you emphasizing as you lead the fundraising effort for the institution?
2. What are the specific skill sets you require on your team to meet your fundraising goals?
3. Are you willing to work with individuals with sales and marketing background who have limited fundraising experience, but a willingness to learn?
4. How will you measure performance?
5. What training, coaching and professional development opportunities do you offer staff?

Things to consider when working with the advancement department

1. *Staff turn-over within the development field is high.* The time and cost of recruiting and training new staff (at all levels) can detract from an advancement department's focus on developing relationships, raising money, and securing resources. A comprehensive fund development plan strengthens the institution by providing all parties with defined roles and responsibilities that help the institution meet its fundraising and fund development goals.
2. *Benefits of working from a fund development/ fundraising plan.* Having guidelines, roles and responsibilities to use as a measure when hiring. Candidates will have the opportunity to learn exactly what it is they are asked to deliver and can assess for themselves the extent to which they are the right candidate for your institution. President/chancellor will have measures to use in managing and partnering with new hire, and a defined method of evaluating performance. Staff know that the president is committed and working to engage lead donors.
3. *Challenges of creating and working from a fund development/ fundraising plan.* Increased length of time prior to hiring decision if a plan is not already in place. Creating a plan requires time and resources that may not be readily available. The process of creating a plan signals a change in the culture that may not please individuals who are content with the status quo.

Read *To Hire or To Plan* on the following pages for more information.

Mel and Pearl Shaw are the principals of Saad & Shaw – Comprehensive Fund Development Services and the authors of *How To Solicit A Gift: Turning Prospects Into Donors*. They worked with the leadership of the National HERC to create the *National HERC Corporate Partnership Program*. Saad & Shaw provides clients with a unique brand of fundraising that combines marketing with fundraising fundamentals. Clients include institutions of higher education such as HERC, community colleges and historically black colleges and universities. To learn more call (510) 834-4310 or visit www.saadandshaw.com.

To Hire or to Plan – That is the Question...

By Mel and Pearl Shaw

Which comes first, the chicken or the egg? Or, put in terms of fundraising, which comes first – hiring development staff or creating a fund development plan? When you feel the pressure to grow your fundraising program you may be tempted to begin recruiting new or additional personnel as soon as possible. We contend that organizations and institutions are best served when recruitment and hiring decisions are based on the content of a fund development plan. It is hard to evaluate whether or not an individual can do the job if you don't know exactly what you want to accomplish. A fund development plan makes everything clear to all parties and helps reduce misunderstandings and mistakes in the hiring process.



Additionally the growing demand for fund development professionals with experience in the many aspects of fundraising requires strategic recruiting and retention programs. Competition for the philanthropic dollar requires a proactive approach to developing and implementing fundraising strategies. A well-prepared fund development plan supports both strategic recruitment and proactive fundraising.

Successful recruitment within a competitive market requires that hiring institutions define their expectations regarding the position they are hiring for. While larger institutions typically have well-defined job descriptions based on industry standards, recruiting based on these doesn't necessarily ensure the right hire will be made. You need to know what the institution wants to accomplish and what specific fund development skills will be required. A fund development plan should contain this information as well as roles and responsibilities to use when creating job descriptions, recruiting, interviewing and hiring.

When recruiting development staff you want to interview professionals with the skills and experience required to implement your plan. Recruiting and hiring using your fund development plan allows you – or the recruiter you are using – to create a more qualified applicant pool because you have explicitly defined the skill set and experience you need. Doing so also allows you to reduce the learning curve of a new hire as the individual will have a roadmap that clearly communicates the organization's fundraising goals, methods, timelines, and processes for engaging volunteers.

Recruiting development staff with the expectation that they will create and implement a development plan limits the pool of qualified applicants and may result in hiring at a higher or lower skill set level than is required for daily operations. It may also mean that the plan developed is based on the skill set of the person you hire instead of the method of fundraising that may be best for your organization.

Fund development plans – like strategic plans – are typically developed by consultants who specialize in planning. These plans are rooted in market research – called assessment and feasibility studies – and are specifically designed to take advantage of an institution's strengths and to help overcome

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challenges that impede giving. The skills and experience required to create a detailed fund development plan are different from those required to implement specific aspects of the plan. Hiring an individual with a strong background in major gifts or special events should increase giving from those areas. Such individuals however do not necessarily have the skill set to create a comprehensive fund development plan that guides all aspects of an organization's fund development and fundraising.

Creating a fund development plan requires a specific skill set. Because of this many organizations contract with consultants to create a customized plan that employs fundraising methods that are a best fit for the culture, mission, location and relationships of the organization. Once created the plan should serve as a multi-year roadmap that guides the work of the president/chancellor, board members, staff, and volunteers. It should include detailed roles and responsibilities for all individuals engaged in fundraising. This helps ensure all parties know what is required of them. The plan should also include evaluation criteria for staff so that expectations regarding the use of time and resources are clearly communicated. As you prepare to hire advancement

professionals and staff it is important that you and the applicants know what the expectations are. Using the fund development plan in the hiring process also gives candidates an opportunity to determine for themselves whether or not they are the right person for a position. A development professional wants to know that the institution has the ability and commitment to use her skills and experience.

Once hired a professional can quickly become productive because of the plan. He knows what needs to be accomplished and can get to work using his skills and experience. Because a well crafted fund development plan contains roles, responsibilities and timelines the work of staff can be evaluated throughout the year. There is no need to wait until the end of the year to measure success based solely on financial results. Adjustments can be made mid-course.

These are a few reasons why we recommend creating a fund development plan before recruiting new or additional staff. Use the Saad & Shaw Fund Development Plan Checklist to learn what should be included in a fund development plan. To receive your free copy call (510) 834-4310 or email melandpearl@saadandshaw.com. ©Saad & Shaw 2009

How to Solicit a Gift
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Melvin and Pearl Shaw

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Valerie Cole-Davis
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