Original Article

Assessing educational fundraisers for competence and fit rather than experience: A challenge to conventional hiring practices

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ABSTRACT This article challenges current recruitment and hiring practices in educational advancement organizations, while proposing a paradigm shift in addressing the talent shortage of fundraising professionals. A case is presented that competence and fit is more important than experience for successful and productive fundraising outcomes. The paper concludes with a prescriptive solution for hiring fundraisers based on a three-step model: recruiting for competence, hiring for organizational fit and training for technical skills. *International Journal of Educational Advancement* (2010) 10, 87–97.
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INTRODUCTION

The complex job of fundraising requires diverse knowledge, skills, abilities and attributes found in many professions. The identification, qualification and cultivation of donor prospects resemble the process carried

out in sales jobs. Developing case statements and writing proposals mirror the technical skills required in marketing and advertising. And stewarding donors post-donation calls for a customer service orientation and attitude found in the service and retail industries.

Interestingly, competence and transferable skills and abilities are largely undervalued and under

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analyzed in today's educational development organizations. During the recruitment process, years of experience carries a disproportionate amount of weight in hiring decisions. This is especially true in the higher education environment.

The fundraiser shortage has been well documented (Worth, 2002; Iarrobino, 2006; Hall, 2007; Eduventures, 2008; Smith, 2008). Consequently, industry leaders have been faced with a challenging dilemma. Should organizations recruit from the small pool of individuals with multiple years of specific educational fundraising experience, or should they focus on competent performers and those with transferable skills? Furthermore, what types of people should they hire, how should they assess fit, and what steps should be taken to ensure optimal productivity?

The talent shortage of fundraisers is the result of a convergence of factors, including a deficient pipeline of talent, a retiring generation of baby boomers in the workforce, and little promotion about advancement and fundraising as a professional career. In addition, few opportunities exist to pursue educational advancement as an academic major or through internships. In fact, Vanderbilt University operates one of the only academic programs in the country emphasizing post-secondary educational fundraising. The University of Michigan has developed an internship program for undergraduate students (Hall, 2009), but despite its initial success, other colleges and universities have been slow to adopt similar programs. More recently, CASE Europe has developed a 3-year graduate trainee program in the United

Kingdom 'aimed at increasing the number of fundraising professionals working in higher education' (Hazell, 2009). This program shows promise for institutions in the United Kingdom and Europe; however, it is too new to assess its effectiveness and implications for US institutions.

Once the economy recovers, the talent shortage of fundraisers could very well emerge with more force than ever before. To avoid this scenario, one solution is to create more academic and internship programs in educational fundraising, such as Vanderbilt's and Michigan's, resulting in discipline-specific and experienced graduates, and thus increasing the pipeline of future development practitioners. Graduates of these programs would be prepared to assume entry-level positions in advancement organizations and succession plans would begin to take shape. However, academic programs of this nature require significant resources, as well as students to fill classrooms. As little effort has been made to promote educational fundraising as a viable career path, initially, it may be challenging to enroll students.

A second option is to recruit and hire competent professionals with little or no previous fundraising experience, and train them with the necessary technical skills to be successful in entry and mid-level fundraising positions. Although developing new academic programs and internships is a long-term solution, hiring competent employees with transferable skills could meet organizational demands in the short term. Unfortunately, today's advancement managers have not fully embraced this strategy, often

claiming they neither have time nor organizational resources to train inexperienced candidates on the hard skills necessary to be successful.

As the debate around this issue intensifies, underlying questions remain. That is, does experience in educational fundraising ultimately lead to superior performance? Or, is there some other factor, such as competence or fit, which more accurately predicts fundraising success? If these questions are answered and positioned with supporting evidence, it could change the way advancement leaders think about and approach the current talent dilemma.

This article seeks to challenge the notion that experience is an important variable in predicting successful fundraising outcomes. First, a summary highlighting the differences between soft skills and hard skills is provided. Competence is then defined and reviewed with supporting literature as it relates to job performance and its importance for successful life outcomes. Next, research is presented on experience and expertise and its relationship to practice and performance. Finally, the article concludes with a prescriptive solution for hiring educational fundraisers based on the research and theoretical underpinnings presented here.

SOFT SKILLS VERSUS HARD SKILLS

In the context of educational fundraising, one should consider the lens through which fundraising 'skills' should be viewed. The general term 'skills' is often categorized as either hard or soft. Peggy Klaus (2007), a workplace communication and

leadership expert, explains the difference between hard skills and soft skills as follows: 'While hard skills refer to the technical ability and factual knowledge needed to do the job, soft skills allow you to more effectively use your technical abilities and knowledge' (p. 2). She further laments, 'You can have all the technical expertise in the world, but if you can't sell your ideas, get along with others, or turn your work in on time, you'll be going nowhere fast' (p. 2). This is especially true in the fundraising profession.

Some jobs, such as information technologist, biology professor and surgeon, require significant knowledge and technical expertise, or hard skills, for one to be successful. In these occupations, more value is rightly placed on the technical proficiencies and knowledge necessary to carry out the tasks and duties of the job. However, in fundraising, soft skills such as communication, building interpersonal relationships and working collaboratively in teams are far more important for successful outcomes than many of the technical aspects of the job. For example, a recent study by Nehls (2008) found characteristics of patience, perseverance, work drive and flexibility, among others, as important qualities of chief higher education fundraisers. Noticeably, missing from her literature is any mention of technical skills required for success.

Consider the analogy of a coach and an athlete. A coach might be knowledgeable about the rules, strategies and regulations of American Football, and thus be considered a technical expert on the game. However, if the same coach does not

possess the soft skills necessary to recruit a high-performing team, and then motivate, inspire and influence his football players to perform successfully, he will more than likely fail miserably. Conversely, a football *player* must possess the necessary athletic (or technical) skills to succeed on the field, rather than the soft skills listed above. To succeed as an athlete requires an entirely different type of skill-set than to succeed as a coach. This explains why many of today's most successful football coaches were often only mediocre players at best (and vice versa).

This analogy holds true in various occupations, including educational fundraising. For instance, a successful fundraising manager (that is, the coach) may have only been an average fundraiser. However, the high-performing fundraiser might fail miserably at management, which is not uncommon. Similarly, a high-performing pharmaceutical sales rep might also be a high-performing car dealer, retailer or restaurant server. A pharmaceutical sales rep might even have the soft skills required to be a successful fundraiser, given the chance.

The point here is that recruiting for competence and fit rather than years of experience may result in greater productivity and successful fundraising outcomes in the long run. The technical requirements of the job of fundraiser can be learned through training and professional development. However, the soft skills necessary for success are more innate and are qualities and talents that often define an individual's behavior and character, variables that cannot be learned.

WHAT IS COMPETENCE?

Competence provides a valid and relevant context for understanding the knowledge, skills, abilities, attributes and behaviors necessary for high performance in just about any domain. For this article, competence is discussed within the context of a job or industry such as educational fundraising.

McClelland (1973) popularized the notion of competence testing when he suggested that aptitude and intelligence alone were insufficient predictors of high performance. He believed, 'For some purposes it may be desirable to assess competencies that are more generally useful in clusters of life outcomes, including not only occupational outcomes but social ones as well, such as leadership, interpersonal skills, etc' (p. 9). McClelland questioned the validity of intelligence tests and asserted that scores on these tests are not valid indicators of job success or job status. According to McClelland, the high correlation between intelligence tests and job status found in multiple studies may be the result of socioeconomic factors and/or credentials, rather than anything else.

At the time, McClelland's conclusions were provocative. His work raised doubts about the relationship between exceptional school performance and successful life outcomes. Since then, many studies have supported McClelland's claims. For example, Thomas Stanley (2000) explored the ideas, beliefs and behaviors of over 700 millionaires and found that clusters of social skills, orientation toward critics, integrity, and creativity (that is, soft skills) outranked intelligence as factors leading to economic success

(p. 35). Stanley concluded, 'The results of my research on millionaires are highly congruent with Professor McClelland's. Grades received in college do not explain a statistically significant portion of the variation in wealth or income, nor do SAT results' (p. 69). In other words, academic success does not necessarily lead to success in areas of practicality, such as one's job or occupation.

In addition, Daniel Goleman (1998) analyzed competency models from 188 companies, suggesting that 'emotional intelligence' components of self-awareness, self-regulation, motivation, empathy and social skill play an increasingly important role in highest-level positions of a company – more so than intelligence and technical skill. In fact, Goleman found that almost 90 per cent of the difference in executive profiles was attributable to emotional intelligence factors rather than cognitive abilities (p. 94). Similar to Stanley, Goleman's research suggests that soft skills are an important factor for successful professional outcomes.

McClelland's (1973) thesis and Stanley (2000) and Goleman's (1998) supporting research provide evidence that competence, rather than pure technical expertise usually obtained through experience, is more important for successful fundraising outcomes.

The following section about experience and expertise makes this point clearer.

DOES EXPERIENCE MATTER?

It depends. Existing literature on experience and its relationship to superior performance follows the same logic of McClelland's thesis of intelligence and its relationship to

successful life outcomes. That is, experience does not necessarily guarantee expert performance. This is an important point of clarification when evaluating fundraisers for competence rather than experience.

Anders Ericsson is a leading scholar on experience, expertise and expert performance and an editor and author of *The Cambridge Handbook of Expertise and Expert Performance* (2006). He contends:

Every healthy person will improve initially through experience, but these improvements are eventually limited by innate factors that cannot be changed through training; hence attainable performance is constrained by one's basic endowments, such as abilities, mental capacities, and innate talents. (p. 683)

In short, Ericsson's assertion is that experience is a weak measure of performance over time. He believes that 'deliberate practice' with intense concentration outside of one's realm of comfort and routine is what leads to superior performance. And not everyone has the tenacity, ambition and drive to engage in deliberate practice to enhance their skills. Tenacity, ambition and drive are measures of one's behavior rather than experience. As Ericsson's research concludes, 'When the behaviors are automatized, mere additional experience will not lead to increased levels of performance' (p. 694).

In the context of educational fundraising, Ericsson's thesis provides a model through which to consider the talent shortage of competent fundraising professionals. Superior fundraising performance requires

something more than verbose promises and a long resume. As in all professions, to achieve a high level of success requires an innate ability to identify one's own weaknesses while consciously setting out to improve upon and acquire technical skills through deliberate and sequential practice. One must be willing to face failure, make mistakes, adjust accordingly and monitor individual learning plans for improvement (Ericsson, 2006). Consistently stretching past one's comfort zone, reaching beyond current abilities and overcoming new challenges turns average performers into great performers (Colvin, 2009). The intent here is not to discredit experience entirely, but rather to hold competence and soft skills in greater esteem. Fundraising success requires unique behaviors that cannot be measured solely by years of experience.

SHIFTING THE PARADIGM

How, then, should one move forward in identifying, recruiting, hiring and retaining successful educational fundraisers in today's employment market? The current model of acquisition and retention has failed in large part because organizations do not spend enough time and resources evaluating their own culture and developing a sound talent strategy that meets current and future business needs.

Anecdotal evidence and existing literature presented in this article charts a new path for successfully recruiting and retaining high-performing fundraising talent. The following pages propose a talent strategy model that entails recruiting for competence, hiring for

organizational fit and training for technical skills.

Recruiting for competence

To assess competence, indicators must first be identified that define superior or high performance. A first step, and common methodological approach among CEOs, managers and human resource executives in business and industry, is to create a 'competency model' (Alldredge and Nilan, 2000; Morrison, 2000; Moilanen, 2002; Rodriguez *et al*, 2002; Chung-Herrera *et al*, 2003; Lin *et al*, 2005). Competency models provide a framework for developing competencies specific to a job or occupation, such as educational fundraising.

There are multiple approaches to building a competency model. Marrelli *et al* (2005) suggest a six-step approach, beginning with defining the objective and concluding with the model's application. Alternative approaches also exist (Alldredge and Nilan, 2000; Morrison, 2000; Moilanen, 2002; Rodriguez *et al*, 2002; Chung-Herrera *et al*, 2003; Lin *et al*, 2005), however most techniques follow similar methods with similar objectives (that is, to identify a set of indicators that measures success relevant to a specific job, job family or organization).

Competency models can be broad or narrow, encompass the entire organization or focus on one mission critical position. It is imperative to have a lead investigator manage the process from start to finish and to serve as a central repository for gathering and disseminating information. Furthermore, the process should be objective, while allowing for flexibility as new information is learned.

Once finalized, the model can be used to create a series of assessment and evaluation tools for identifying and recruiting high-performing employees. These tools should measure an individual's competence, while providing some initial information about workplace behaviors and potential organizational fit, as discussed in the next section. Example assessment tools include phone screen, interview, and reference check questions, writing tests, questionnaires and careful resume screening. An objective scoring system will help increase the chances of identifying prospects that meet a minimum standard of competence as determined by the organization. For example, if your organization values initiative, creativity and political acumen, then assessment tools should include indicators that measure these variables.

Hiring for organizational fit

After candidates have been vetted through the competency assessment and evaluation process, the next step is to assess organizational fit. That is, do potential candidates not only possess the soft skills and competence necessary for superior fundraising performance, but are their workplace behaviors and values consistent with those of the organization?

Person-organization fit theory has been studied for decades. Many frameworks and concepts help to define person-organization fit, however Kristof (1996) summarizes it simply as the 'compatibility between individuals and organizations' (p. 3). Supplementary fit, often referred to as person-culture fit, is an operational distinction that refers to the compatibility between an individual's characteristics and

the values of an organization (Kristof, 1996). These values guide an organization's behavior, and therefore should be consistent with the characteristics of both current and new employees for optimal productivity and organizational success.

In analyzing and defining an organization's culture, or 'DNA', questions should be answered that center around priorities, principles and guiding values that both shape and guide the organization. In addition, understanding the organization's overall philosophy, as well as what makes it different or unique, are equally important variables. Senior managers and human resource executives should work together to carefully appraise their organization's culture as it stands today, and the type of people that are necessary to produce effective organizational outcomes for the future. Once an organization's culture is appropriately defined, the next step is to assess workplace behaviors of potential candidates during the recruitment and hiring process to determine if a fit is present.

There are many diagnostic tools that can help assess workplace behaviors and fit, such as the Activity Vector Analysis (by Bizet Human Asset Management) and the ProScan (by Professional DynaMetric Programs). The Activity Vector Analysis (AVA) 'predicts work-related behaviors, decision-making approaches, flexibility under various environmental conditions, and other important aspects of behavior' (Bizet Human Asset Management, 2007a). A second diagnostic tool, called the Job Activity Rating (also by Bizet Human Asset Management), allows an employer to

create a unique profile of behaviors necessary for success in a specific job within an organization. For best results, hiring managers can use the competency model and 'DNA' analysis in selecting appropriate behavioral indicators for the job profile. Measured against an individual's AVA, the Job Activity Rating (JAR) provides the employer with a correlation score that determines the compatibility, or fit, of a candidate's behavioral style with the requirements of the job (Bizet Human Asset Management, 2007b). The ProScan works in much the same way. Although the variable of fit, as measured by these programs, focuses more on the specific job than it does on the organization, hiring managers can easily incorporate some of the cultural aspects of the organization when creating the job profile. For instance, if an organization places a high value on teamwork, job indicators can be chosen that reflect collaboration and working effectively with groups.

Finally, a holistic assessment of the candidate is necessary before a final hiring decision is made. For instance, does the candidate possess most of the competencies detailed in the competency model? Are the candidate's values consistent with the organization's? Does the candidate possess the right 'DNA' to be successful? Are the candidate's workplace behaviors consistent with the workplace behaviors of the organization and the job under consideration?

If answers to these questions are still unclear, additional screening through follow-up interviews is recommended. Analyzing response data from all diagnostic tools

(including both competency and organizational fit assessments) can be used to create strategic follow-up questions to tease out deeper and more meaningful responses. If answers through additional interviews are satisfactory, organizations can enter into an employment agreement with inexperienced or non-traditional fundraising candidates with a high level of confidence.

Training for technical skills

As stated previously, competence and workplace behaviors are variables that cannot be taught. They are what Ericsson (2006) refers to as 'innate factors that cannot be changed by training' (p. 683). In the context of educational fundraising, competencies and workplace behaviors that are a good fit with an organization are variables that only certain people possess, regardless of years of experience. These variables should emerge and be identified in the recruitment and screening process long before an offer is ever made. However, once hired, developing employees' technical skills through training and professional development programs is the responsibility of the employer (Deloitte, 2004), especially in the case of inexperienced candidates.

Branham (2005) refers to employee turnover as an 'engagement-to-departure' process. Organizations lacking sophisticated on-boarding, training and professional development programs are at an increased risk of losing new hires (especially inexperienced ones) within the first year of employment. Disengagement can occur within a few days or as long as a year or more, but the employee will eventually leave (Branham, 2005).

On-boarding begins during the recruitment process. The recruiter or hiring manager (whoever is overseeing the recruitment process) should maintain consistent communication from the recruitment phase throughout the on-boarding process. Frequent and responsive communication is essential. Having an internal contact providing a high level of service for a new employee is important for a smooth transition. This is especially true when hiring inexperienced fundraisers.

Once on-board, a carefully structured engagement and orientation plan should be put into action. All resources necessary for the first month of employment (computer, phone, office supplies and so on) should be provided on the first day. The engagement process should include orientation meetings with key stakeholders throughout the organization, including cabinet members, middle management and relevant colleagues. Important meetings should be included on the orientation calendar, as well as key dates for upcoming events. The initial schedule should transition the employee through the first 4–6 weeks of employment, while providing multiple opportunities for exposure across the organization.

In addition, providing new employees with opportunities for success is an important component during the on-boarding and engagement process. It not only builds confidence, but also increases employee satisfaction. Hiring managers should assign projects that are not only meaningful and productive, but also provide new employees with organizational exposure. This requires significant mentoring and supervision, and a great deal of humility by the manager. However, the payoff of

delegating, closely supervising and ensuring a big win on a high-exposure assignment within the first few months of employment is invaluable to a new employee.

Finally, and perhaps most importantly, creating and implementing a comprehensive internal training and professional development program, beyond the traditional on-boarding and orientation process, is essential. Training new employees requires significant time and resources, of which many advancement leaders claim they have neither. However, the argument can be made that an investment in a comprehensive training and professional development program will actually save the organization money. Iarrobino (2006) cites a US Department of Labor statistic that it costs an organization 33 per cent of a new employee's salary to fill and replace a vacancy. For example, if the average development officer's salary is US\$100 000, and a 30-person organization loses just 15 percent of their staff each year (4.5 people), the organization will spend nearly \$150 000 annually to replace lost employees. Moreover, Eduventures (2008) reported that engaging a search firm increases the replacement cost to 1.5 times the annual salary. These large sums of money could be used to hire and train inexperienced or non-traditional fundraisers who are competent and possess workplace behaviors that are a good fit with the organization, and thus decreasing turnover in the future.

CONCLUSION

Despite the economic downturn, a recent article in the *Chronicle of Philanthropy* suggests significant

growth at senior-level non-profit jobs over the next few years (Joslyn, 2009). In addition, even though some institutions have been faced with layoffs, the education sector as a whole is one of the few industries that continues to grow. As a result, the need for innovative talent strategies to meet future educational fundraising demands should remain an important objective among advancement leaders and managers.

There is also a considerable gap in strategic talent planning in most advancement organizations. As this article illustrates, selecting individuals with a high probability of achieving successful outcomes and workplace behaviors that are a good organizational fit should carry more weight in the recruitment and hiring process than years of previous fundraising experience. These concepts have been supported and proven through existing literature and research as presented in this article.

In conclusion, there is, and will be, no easy solution to the current talent shortage without a concentrated effort by advancement leaders to consider alternative, creative and innovative strategies moving forward. Identifying and hiring candidates with the right competence and organizational fit is a crucial first step in the hiring process. However, implementing a rigorous internal engagement and professional development program is equally important, and requires entrepreneurial and courageous leadership by middle- and senior-level managers to carry out. These strategies will not only decrease employee turnover, but increase employee satisfaction, organizational productivity and ultimately fundraising revenue.

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