CONDUCTING A SEARCH
FOR A PROFESSIONAL FUNDRAISER

TABLE OF CONTENTS

Introduction

Conducting an effective search for a development professional can mean the difference between months of frustration and poor results, or the efficient identification and hiring of an excellent candidate. An effective search begins long before the start of the candidate interviews, and continues after the hiring process is complete. Key questions that must be addressed include:

- ***What are the major goals the person in this position must address?***

- ***When do we involve our governing board in the search process, and how?***

- ***What questions do we ask our candidates?***

- ***How do we evaluate our current staff's performance?***

This document will aid you in identifying the answers to these questions, taking you from discovering what your organization needs in a development professional to hiring the most effective candidate for the job.

Defining the Position: Assessing your Organization's Needs

In the rush to find the perfect person for an important, necessary, and possibly vacant position, it is important to step back and take a comprehensive look at the goals of your organization and the role of the Development Professional within this framework. The following action steps are recommended before writing a position specification:

- *identify* the reporting relationships surrounding the position;
- *assess* the environment in which the professional will be working; and
- *delineate* the major goals the position must address.

Writing a Position Specification

Who Should Be Involved

The first step in finding the correct professional for your needs is to establish what those needs are. A needs assessment should involve members of the board, a search committee formed for the task, members of the staff with working knowledge of the position and/or outside constituencies as appropriate.

As no two organizations are alike, each will involve different key people in the search for a development professional. It is important, however, to identify those people and the level of their involvement in the search as early as possible. One person should be chosen as 'point' with responsibility for gathering, collating, and presenting the information collected.

When Should the Position Specification be Written
The Position Specification must be drawn up before the interview process begins, but it is emphasized that a formal Position Specification should be shared only with the final candidate selected by your organization.

What Should Be Included
A Position Specification should be as comprehensive as possible to serve your organization's needs. Clear-cut requirements, well-defined responsibilities, and a picture of the internal organizational framework of your organization are all helpful, both to the candidate you select and to the interviewer.

The following page may serve as a checklist for the composition of your Position Specification.

12 Key Points to Address in a Position Specification

1. Position title.

2. Position reports to.

3. Date Position Specification prepared/approved.

4. General scope/responsibilities of the position.

5. Specific areas of major/priority responsibilities of the position.

6. Extent/limitations of authority assigned to the position.

7. Professional characteristics/expectations of the position.

8. Professional background, experience and knowledge required of the position.

9. Internal organizational framework for the position with respect to reporting lines of authority within the particular Department/Division/Area under the position's direct supervision as well as the relationship of the position within the larger organization.

10. External relationships of the position with respect to governing board contacts/responsibilities, and other such required/preferred contacts with individuals and groups outside the organization's administrative management.

11. Operating budget for the Department/Division/Area under the position's direct supervision as well as the organization as a whole.

12. Compensation for the position including salary, employment benefits and "perks" as well as some indication of the position's future expectations based on exemplary performance.

Finding Qualified and Desirable Candidates

With a comprehensive Position Specification in hand, it is time to begin looking for candidates. Professional networking is often an excellent way to find prospective candidates. Talk to top executives, volunteers in philanthropy, people in whom you have confidence – people who understand the needs of an organization roughly the same size and with needs similar to your own. Once candidates have been suggested, send them a job description and a directed letter of invitation to apply.

Professional organizations, such as the Association of Fundraising Professionals (AFP) may also yield some good names. Place an ad in your regional newsletter and you'll receive a host of résumés. Be aware, however, that advertising may broaden your base of candidates and bring in many who are unqualified. Sifting through such material can take valuable time and resources away from a focused search.

If you wish to get a deep pool of candidates to choose from, advertising in a national trade paper and web site such as the *Chronicle of Philanthropy (philanthropy.com)* will bring applications from all over the country. When choosing this option, remember to plan for possible relocation costs, flying in potential candidates for interviews, and performing out-of-town reference checks.

Another place to post a job description is on your organization's own web site, where candidates will not only learn about the position, but also become acquainted with the larger goals of your organization.

While there are many ways to seek and find excellent potential candidates for your open position, the best use of your time is to ask someone who has recently performed a similar search about his experience.

Conducting Effective Interviews

Conducting an effective interview involves turning a subjective conversation into an objective exercise. This being said, there are as many styles of conducting an interview as there are people who conduct them. The following suggestions and proposed interview questions are intended to serve only as general guidelines; each organization should tailor its interview to suit the position being filled.

Interview as Dialogue

Before going into an interview, be confident that you have thought about and can answer questions that the potential candidates may ask. These questions may include:

- What benefits are associated with the job?
- Will the position have clerical support?
- Where will the new hire sit?
- Will the candidate be provided with a computer and, if so, what kind?

In order for a newly hired professional to be productive, she must have the necessary tools ready and waiting.

Compensation

Inevitably, in an interview situation, the subject of compensation will arise. In our experience, it is always better for the organization to broach the subject; we have found that often, if the candidate raises the issue first, the reaction of the interviewer is to equivocate in an attempt to postpone the question until the appropriate point in the interview.

This 'appropriate point' happens after the interviewer makes clear to the candidate the organization’s benefit package. Tell the candidate about medical, dental, and/or life insurance benefits and be prepared with names of specific coverage providers. Review your organization's retirement policy. Don't forget to mention specific position perquisites as well – car allowances, membership in clubs and/or associations, and the type of office space and support available.

After describing the benefit package, the interviewer can feel comfortable asking, "What are your salary requirements?" or "What is an acceptable salary range: the lowest salary you would be willing to accept and the highest figure you can imagine earning?" The latter question is not only an excellent way to gauge salary requirements, but a great test of a candidate's self-confidence when it comes to asking for money!

Checking References

Reference checks are best conducted by a professional search consultant, or the person directly responsible for hiring the candidate. This is the person most knowledgeable about the requirements of the position, and the one who has spent the most time interviewing the candidate. While checking references, he/she can confirm or challenge her intuitive feelings resulting from these interviews.

Occasionally, the person most responsible for hiring the candidate will feel he/she does not have the time to check references and will assign the task to a subordinate. Often this results in a much less thorough reference check and one that does not answer the questions most central to the issues of hiring. If a subordinate must be used to conduct a reference check, it is wise to direct the process by clearly stating the specific issues and questions you would like to have addressed.

Hiring and Beyond

You've hired a great professional… is that the end?
Once you've hired your ideal candidate, the temptation is to sit back, let that person go to work, and hope you'll never have to hire for the position again. Unfortunately, excellent professionals seldom stay with one organization for the entire length of their careers. It is also true that the needs of an organization, like the needs of an individual, rarely remain unchanged over time.

Therefore, it is important to continue to evaluate the needs of your organization, as well as the performance and goals of your development staff.

It is also recommended that you, your volunteers and your governing Board stay apprised of the changing needs and goals of your organization, as well as a clear-cut understanding of how these goals are being achieved.

A Final Word

Finding the perfect person for a key position is always a difficult task, yet it can be accomplished without stress if priorities are clear and the process itself is clearly delineated. As with most things in life, communication makes all the difference: communication between those in charge of hiring, between support staff and leadership, and between interviewer and interviewee. Mistakes are made far less often when all participants agree beforehand on the process itself, its goals, and each individual's role in accomplishing these goals.