



An IU Foundation & IU Lilly Family School of Philanthropy collaboration

# Cultivating fundraisers: Innovative approaches for building your team

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1

## Your hosts



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2

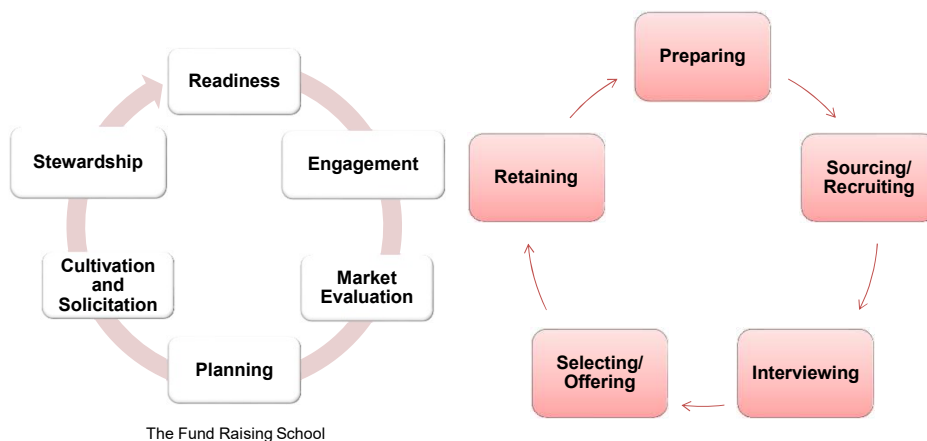
## Learning Objectives

1. Review industry research about fundraiser expectations, competencies, and experiences and consider their implications for your organization
2. Learn about efforts to diversify the fundraising workforce and apply them in your context
3. Develop creative strategies for hiring processes across the fundraising spectrum
4. Benefit from other participants' experience and expertise



3

## Fundraising cycle / Talent acquisition cycle



4

## Opening Poll

Choose your top talent priority for 2023:

- ➔ Hiring diverse talent
- ➔ Attracting better talent
- ➔ Increase hiring budget

5

### Top three talent acquisition (recruitment) priorities for 2023:



Nonprofit HR, 2023



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6

## National context

The Great Resignation of 2021-22

Half of all fundraisers have looked for a new job.

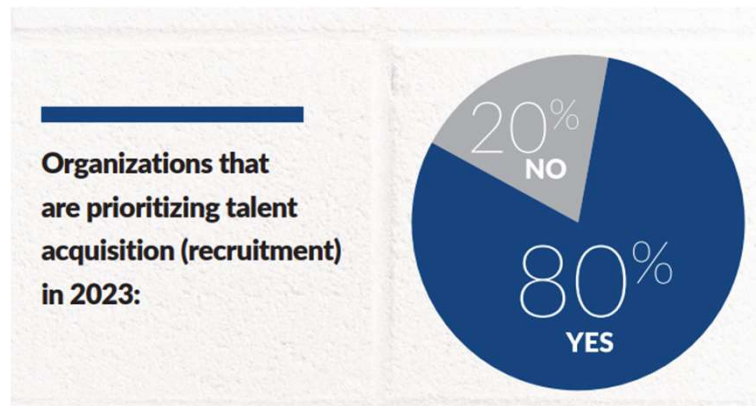
"I will work in nonprofit as long as I can support my family, but it is getting increasingly difficult. I may have to consider a job in the for profit world."

"Compensation is the biggest reason jobs change. People on our team leave for higher compensation elsewhere more often than they are promoted internally."

2022 AFP Compensation & Benefits Report



## If your organization isn't proactive, it's reactive ... or, it's still a job-seekers market



Nonprofit HR, 2023



## Case study: Indiana University Foundation



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Executive Vice President  
IU Foundation



9

## The Way Things Were...Indiana University Foundation Talent Concerns Circa 2017



10

**PREPARING**

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**SOURCING/RECRUITING**

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**INTERVIEWING**

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**SELECTING/OFFERING**

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**RETAINING**




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11

## Pipeline Programs and Initiatives – IU Foundation

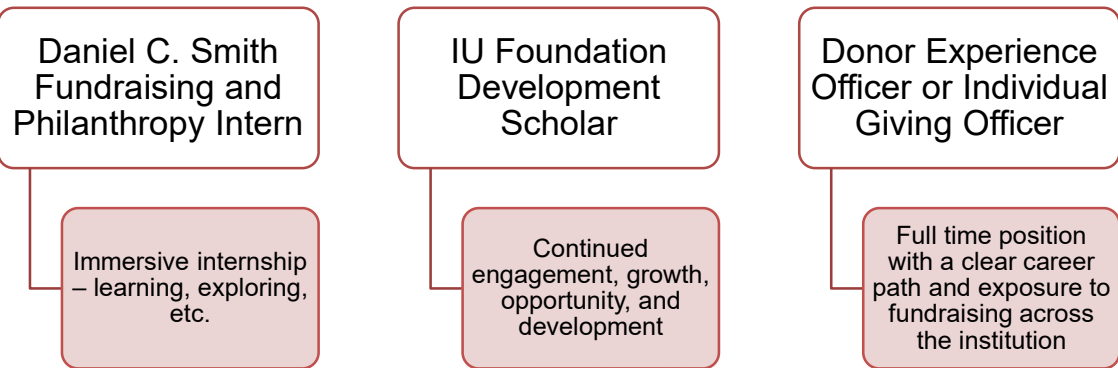
|  |  |
|--|--|
| <p><b>Award-winning Development Internship Program</b></p>                   | <ul style="list-style-type: none"> <li>• Immersive learning &amp; networking</li> <li>• Capstone presentation &amp; case competitions</li> </ul>   |
| <p><b>Development Scholars Program</b></p>                                   | <ul style="list-style-type: none"> <li>• NEW rotational program to address skill gap between internship and full-time fundraising role</li> <li>• 15-20 hours per week; paid</li> <li>• Transition from immersive learning experience of an internship to provide on-the-job, skill development and relevant work experience</li> <li>• Guaranteed job placement at close of rotation (with strong performance)</li> </ul> |
| <p><b>Individual Giving Officer Program</b></p>                              | <ul style="list-style-type: none"> <li>• Focus on high value, unassigned prospects</li> <li>• Intentional training/onboarding to create career opportunities at the Major Gift level</li> </ul>  |
| <p><b>Digital Experience Officer &amp; Annual Giving Officer Program</b></p> | <ul style="list-style-type: none"> <li>• Large portfolios of digital/call-based fundraising for donor acquisition and supporting early career fundraisers</li> <li>• Trains early career fundraisers for Individual Giving and Major Giving roles</li> </ul>   |



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12

## Example: Development Scholars Program Jumpstarting a Career in Fundraising



## Preparing: Best practices from the field

- Expectation alignment
- Job description vs. Ad copy
- Consistent interview panel
- Question guides
- Spending time wisely




**PREPARING**

**SOURCING/RECRUITING**

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15

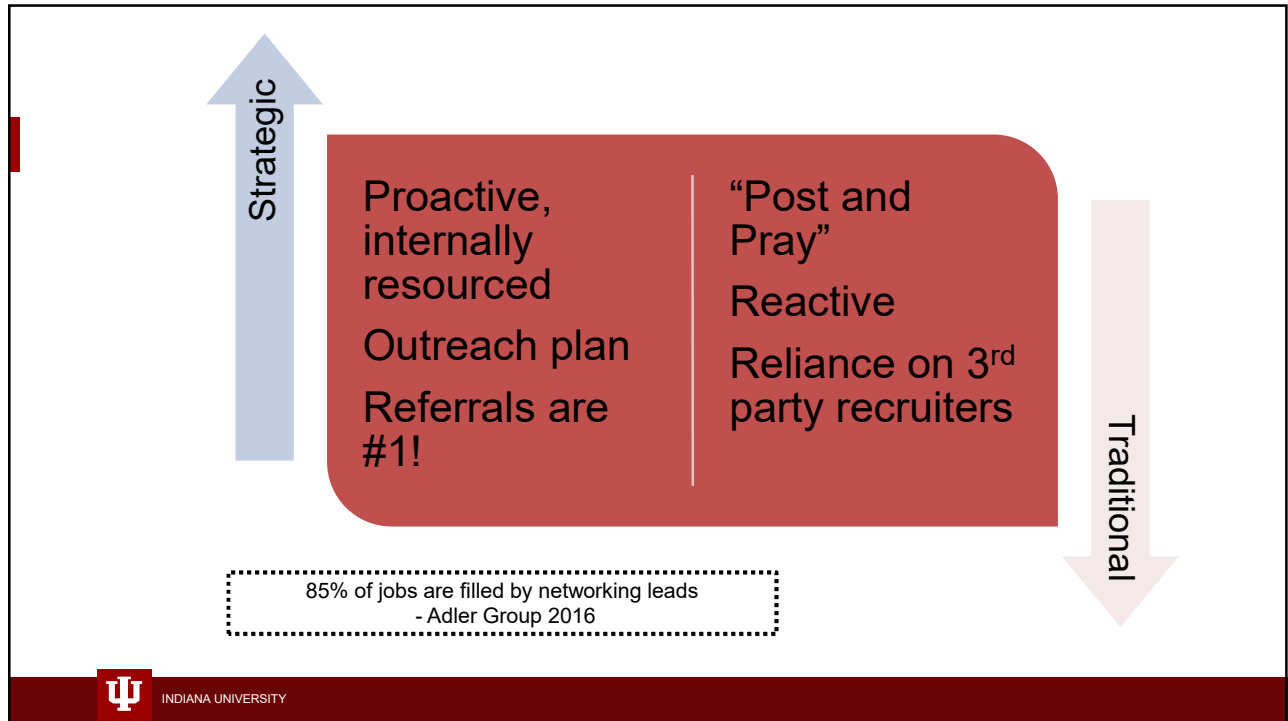
**Poll**

**Where do you advertise an open fundraising position:**

- The local newspaper**
- Indeed**
- LinkedIn**
- APF listserves**

16





17

## Leveraging Technology

### Applicant Tracking System

- Create a strong candidate experience from job application to pre-employment
- Ensure consistency in interviewer assessment to minimize biases in hiring
- “Opt in” talent community to collect information on prospective candidates and establish an internal talent pipeline

Emails (1)
Reviews
Interviews
Notes
Activity
For

Overall Rating\* ★★★★☆

Enter your feedback

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Diversity and Inclusion ■■■■■■■■■■

Please choose at least one question. Questions in this set will evaluate a candidate's commitment to diversity and demonstrate how they will bring that to the workplace.

Enter your feedback

---

Independent / Self-Starter ■■■■■■■■■■

Please choose at least one question from this set. These questions will show if a candidate is motivated or ambitious to start a new project without the help of others.

Enter your feedback

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Project Management Skills ■■■■■■■■■■

For roles that will require oversight or management of collaborative projects.

Enter your feedback

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Leadership and Management ■■■■■■■■■■

Choose at least two of these questions for roles that include people management or program management.

18

## “Focus on passion, mission alignment, aptitude and skills including transferable skills.” Grant and Shiller



Pipeline Options – Looking Beyond the Obvious

Diversity, Equity, and Inclusion in Advancement  
A GUIDE TO STRENGTHENING ENGAGEMENT AND FUNDRAISING THROUGH INCLUSION



Pipeline Expansion Within The Team



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## Elements of screening

Screen OUT

- Time in roles
- Salary alignment
- Communication concerns

Screen FOR

- Knowledge, skills, and abilities, including transferable skill sets
- Shows interest in the role, employer, and mission
- Proven ability to meet or exceed fundraising metrics/goals



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## But, also be open-minded...

1. Unrecognized talent such as the admin team or even volunteers
2. Outsourcing some aspects of the work to allow fundraisers to focus on core tasks/activities

Chronicle of Philanthropy, November 1, 2022



21

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**PREPARING**

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**SOURCING/RECRUITING**

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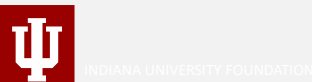
**INTERVIEWING**

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**SELECTING/OFFERING**

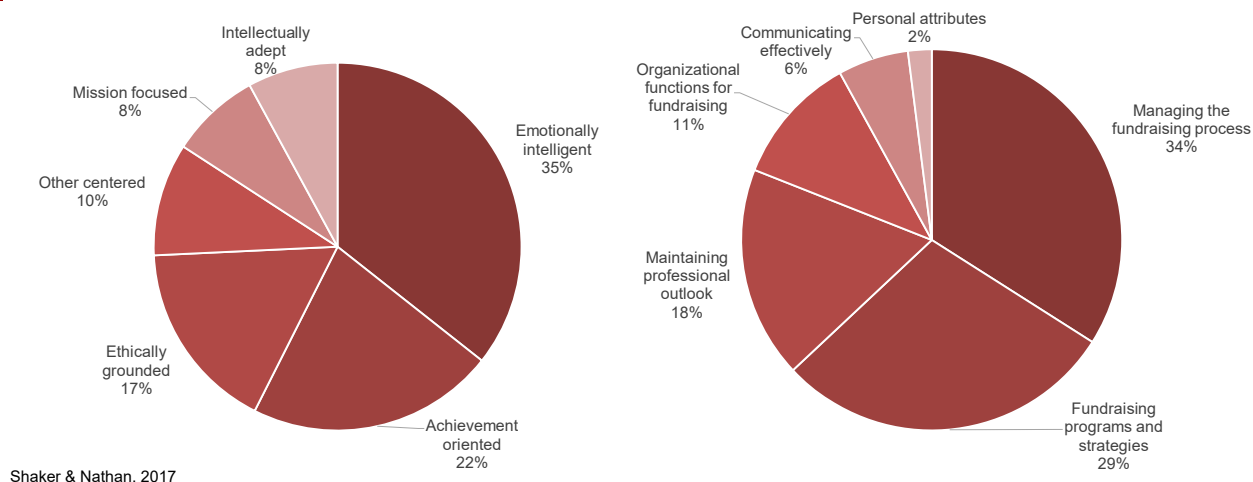
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**RETAINING**



22

## Attributes of successful fundraisers



23

## Elements of interviews

*"Focus on passion, mission alignment, aptitude and skills including transferable skills." Grant and Shiller*

1. Trained and prepared interviewers
2. Questions determined in advance
3. Behavioral-based questions (BBQs)
4. An assessment rubric

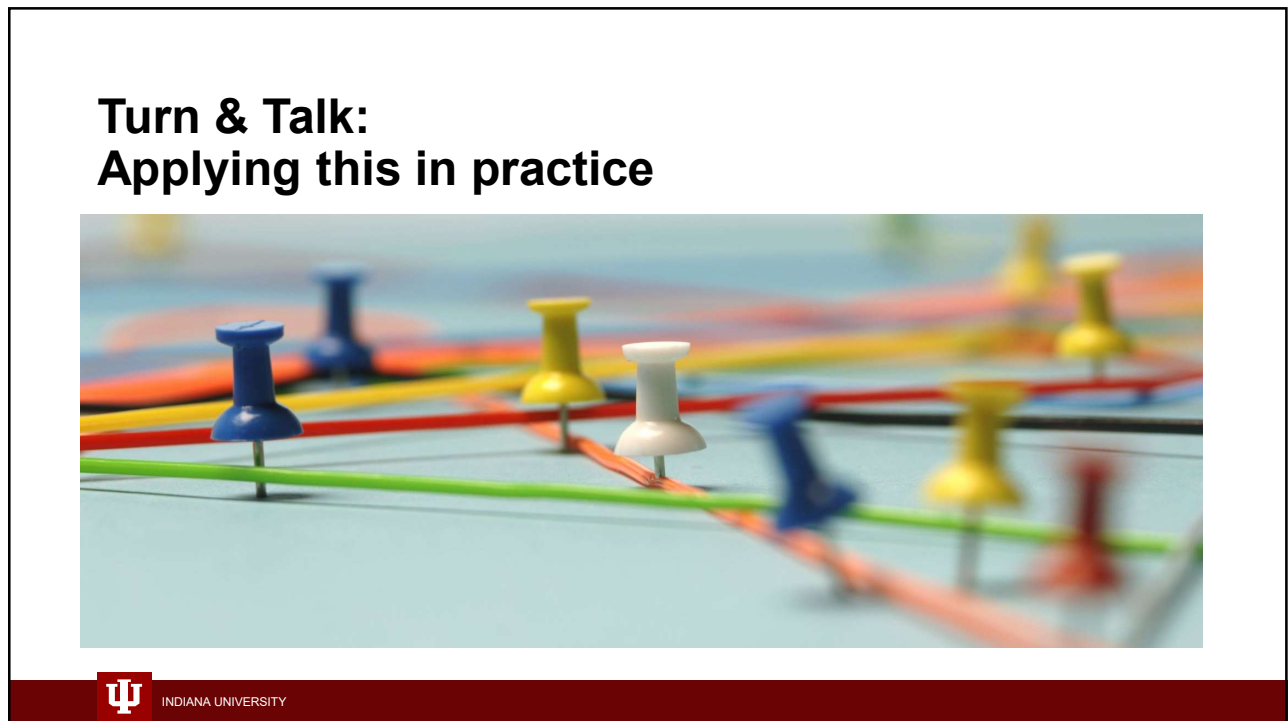
Example: Describe a time you had to share your expertise or resources with others to achieve a common goal. What role did you play? What was your approach?

Example: Describe a time you were instrumental in creating or improving a relationship with another department.

24



25



26

**PREPARING**

**SOURCING/RECRUITING**

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**SELECTING/OFFERING**

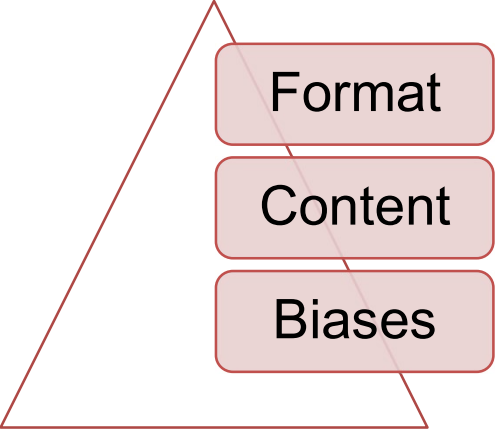
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27


**Candidate Debrief**



Format

Content

Biases

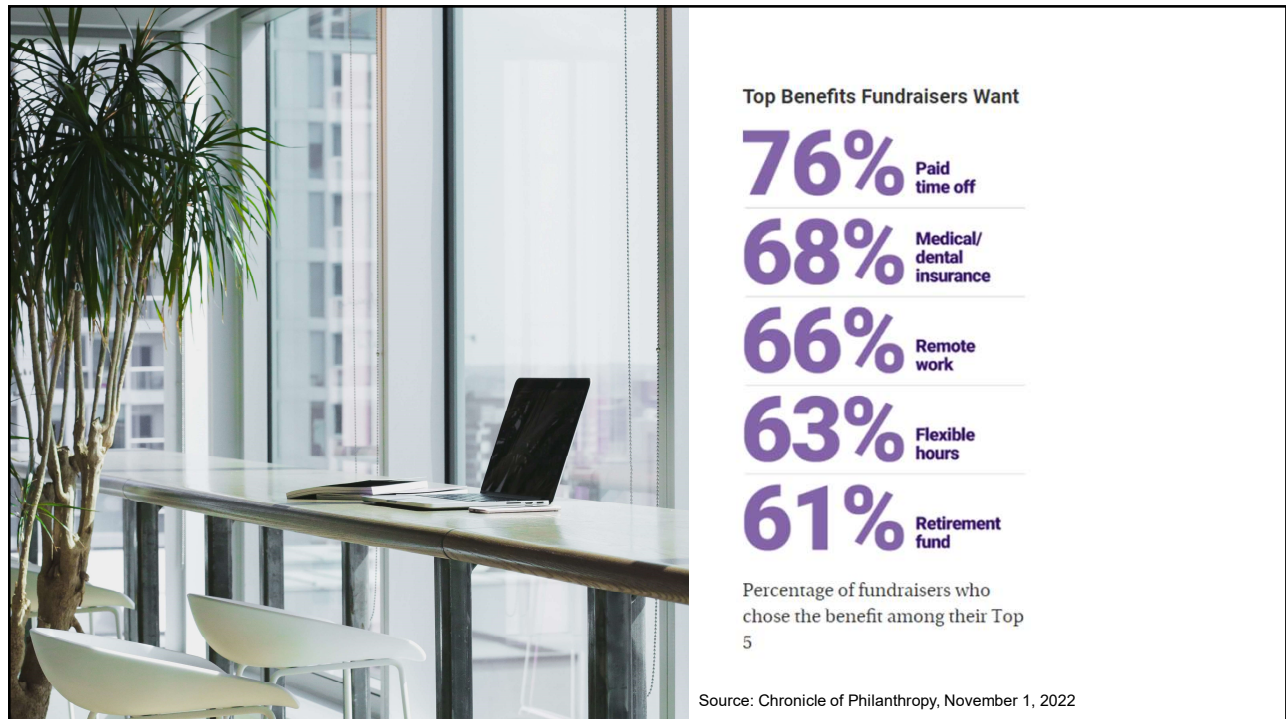


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28

## Elements of the offer

| Base Salary  | Benefits  | Incentives   | Timeliness  |
|--|---|--|---|
| <ul style="list-style-type: none"> <li>• Transparency</li> <li>• Based on market ranges, internal equity, candidate's professional and educational background</li> </ul> | <ul style="list-style-type: none"> <li>• Health plan</li> <li>• PTO</li> <li>• Wellness</li> <li>• Retirement</li> <li>• Travel</li> <li>• Flexibility</li> </ul> | <ul style="list-style-type: none"> <li>• Learning and development opportunities, career-pathing, rotations</li> <li>• Monetary sign-on, retention, and/or performance bonuses</li> </ul> | <ul style="list-style-type: none"> <li>• Offer made 1 week after last interview</li> <li>• Verbal offer made by hiring manager</li> </ul> |




**PREPARING**

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31

**Recommendations from the research**



- Ensure a Good Start (onboarding)
- Include Fundraisers in Decisions
- Flexibility Matters
- Set Realistic Expectations
- Recognize and acknowledge successes

Chronicle of Philanthropy, November 1, 2022



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32



## IUF Retention Initiatives



Organizational Strategic Talent Planning & Succession



Standard Processes for Performance and Goal Setting

Quarterly Check-In's (performance & "stay interview")



Central fundraising forums across all campuses/units

Monthly meetings with peers and leaders  
Semi-Annual "Impact Summit" (virtual + in-person)



Structured mentoring program

Career assessments  
Mentor guidelines and careful selection of mentors  
Focused on building skills, knowledge in specific career tracks



## Case study: Indiana University Foundation



Joyce Q. Rogers, Esq.  
Executive Vice President  
IU Foundation



## FY2023 YTD Hiring Metrics (IUF)

|  |        |
|--|--------|
| External Hires   | 47     |
| Internal Promotions/Hires                                      | 11     |
| Racially Diverse Hires as a Percentage of Total Hires for 2022 | 27.66% |
| Current Staff Diversity Percentage                             | 10%    |



35

## Case study: Indiana University Foundation What did true change require?

*Philanthropy, Pride & Tradition / October 6, 2021*

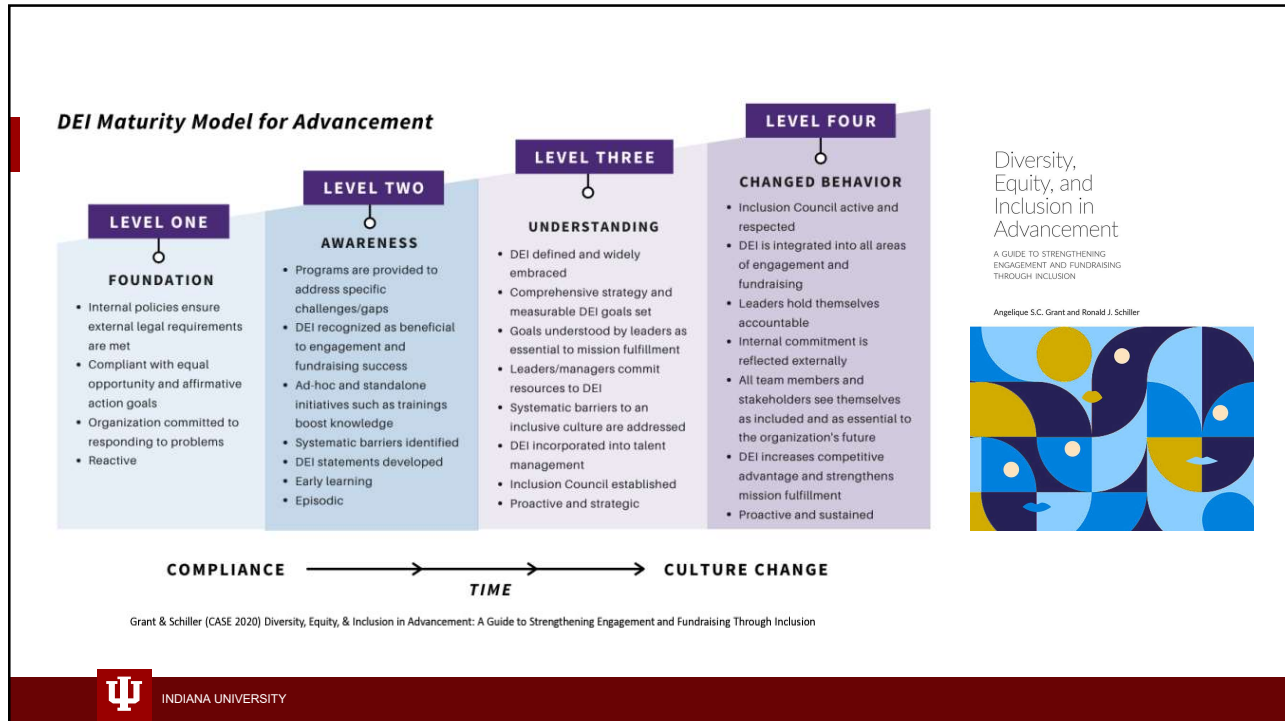
Donors Join Forces To Support IU's LGBTQ+ Community



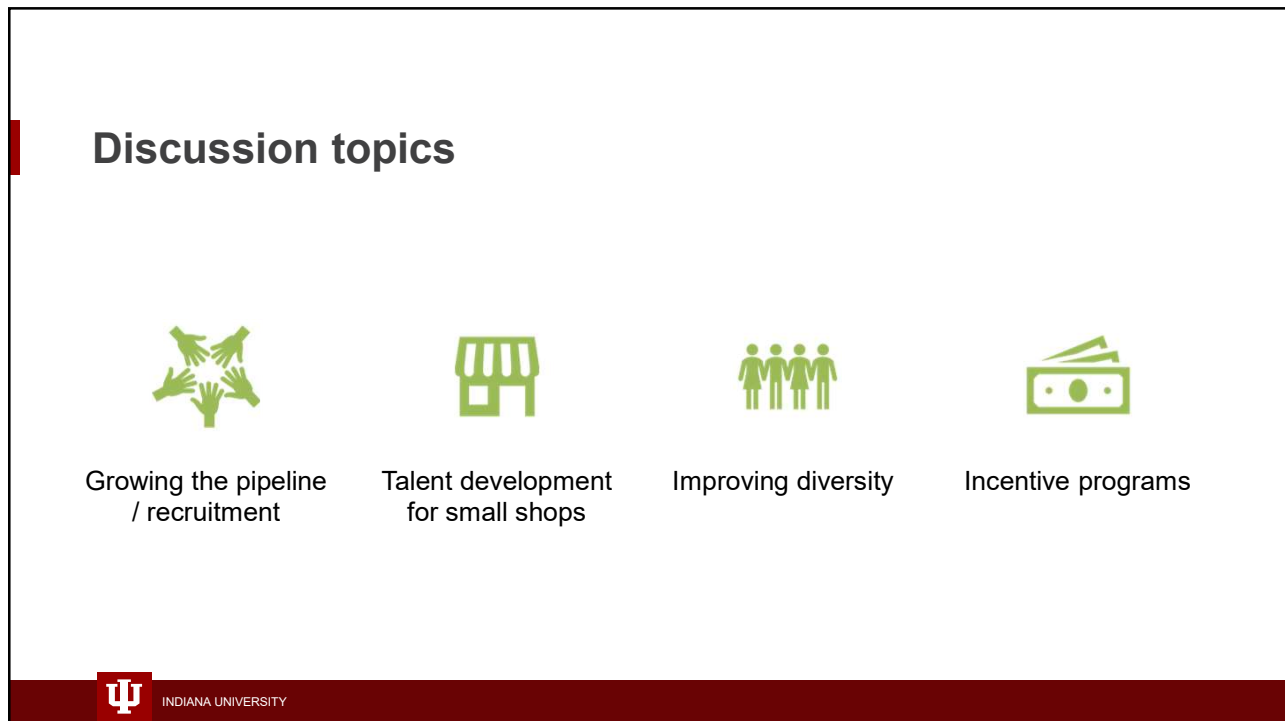
Diverse philanthropy is one of the most powerful tools we have in supporting historically underserved communities. Indiana University's Black Philanthropy Circle, the first of its kind, is the perfect reflection of this spirit. By gathering a group of passionate individuals from across IU, the Black Philanthropy Circle is dedicated to one central goal: helping Black students, faculty, and staff succeed at IU.



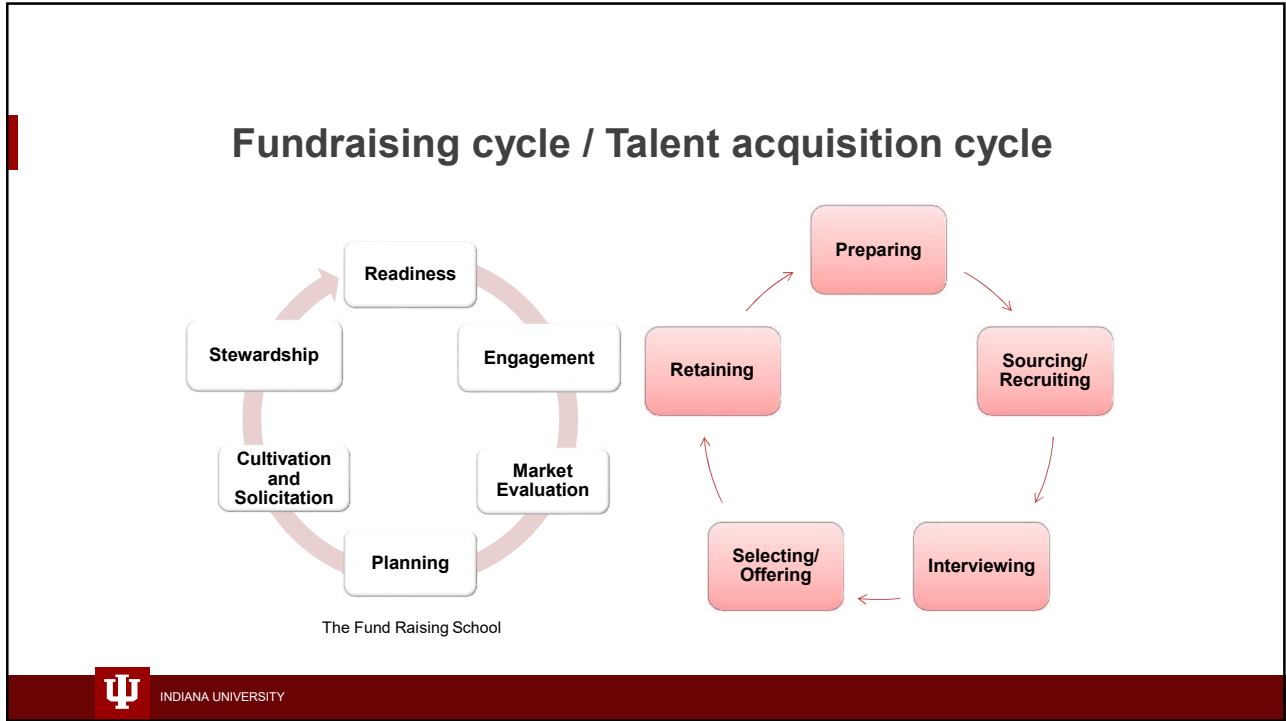
36



37



38



39



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40