

The right people in place

Project 14. Getting the right people as fundraisers

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Reviewed by Kath Abrahams

The original brief

As in a small number of other professions, public comfort and confidence in fundraising depends upon donors having contact with people who have specific qualities and characteristics. For fundraising what's needed are qualities that inspire empathy, trust, compassion and confidence. So recruiting and retaining the right people are essential to fundraising success. This project will consider the attributes that donors expect to see in the fundraisers they deal with and how recruiting specifically with those attributes in mind will significantly improve the donor experience.

For senior management and trustee boards, this project will:

- Explain the benefits of investing in staff retention and having inspiring induction programmes that emphasise the importance of the donor experience.*
- Help them understand the attributes that make a great, donor-focused fundraiser. Additionally, they will also learn the attributes required to be successful in the main fundraising disciplines.*
- Introduce them to a range of ideas of how the recruitment process can be improved to increase the quality of fundraisers working for their organisation.*

For donors, this project will:

- Reassure them that fundraisers are well trained and care about the experience the donor has.*
- Increase the competence and donor focus that fundraisers will bring to their job.*
- Reduce the chances of experiencing poor fundraising via untrained, unmotivated and unengaged fundraisers.*

Summary of findings

At the heart of every fundraiser, regardless of the discipline, is a relationship builder. To be donor-focused is to communicate the urgency and importance of a cause and to provide the donor with a clear way to make an impact based on their abilities, skills and resources. But how do we attract these donor-focused fundraisers? Where do we find them? What recruitment processes help or hinder us? And when we have these donors, how do we keep them?

Our report will provide you with thoughts about the key attributes of such fundraisers in general and about fundraising techniques. We outline tweaks and changes to your recruitment and selection processes, as well as highlighting what keeps these fundraisers developing, growing and staying with you.

We have used our experience and professional background, together with examples from across the sector. We have also been talking to people – fundraisers, managers of fundraisers and directors of fundraising – to obtain their views and experiences too.

How to use the findings

We recommend you use the information to have a bit of a spring clean. What is your mind-set when looking for fundraisers? Are you describing the job in a way that attracts the people you want? Do you have a highly robust person spec that really gets to the heart of what you are looking for so you can test it out in a competence-based interview? How good are your interviewing skills and those of others around you?

Use this report to review all these processes and your behaviours and skills related to attracting, recruiting and retaining donor-focused fundraisers. Have a chat to your HR/Recruitment colleagues and refresh your strategy for recruitment. With your managers, discuss ways of creating a high-performance environment in which your fundraisers can thrive using the information we have consolidated. Have a look at your induction programmes and on-going learning and development plans: Are they supporting your fundraisers to become donor-focussed, and are you rewarding that behaviour through feedback and tangible recognition?

Our findings are not exhaustive and are more pointers and prompts than a blueprint; however, we believe they will help you to stand back and take a good look at the how and the what of recruiting and retaining donor-focussed fundraisers.

Broad scope

To define the personal qualities, characteristics, skills, attitudes and behaviours of high-performing donor-focused fundraisers so they may be found, attracted, recruited and retained.

Key objectives

- To define what a high-performing donor-focused fundraiser looks like and sounds like, and how s/he behaves.
- To identify patterns in the personal style of a high-performing donor-focused fundraiser.
- To establish whether different skills and behaviours are needed in different FR disciplines.
- To identify the climate in which high-performing donor-focused fundraisers can thrive.
- To outline top-line guidance regarding how to find people, recruit them, train those already in the position as well as newbies, and ways of retaining all of them to establish consistency and results.

Top ten attributes of donor-focused fundraisers

These are ranked by how frequently the attribute was mentioned in all our feedback.

A donor-focused fundraiser:

1. Has excellent people skills, able to establish and build relationships with donors.
2. Connects to the cause, communicating its urgency and importance in a captivating and compelling way.
3. Adapts his/her style and approach to the person and situation.
4. Listens and respond to donor needs.
5. Is genuine and authentic, demonstrating integrity at all times.
6. Thinks quickly.
7. Has drive and resilience.
8. Organises his/her time and resources.
9. Builds his/her technical skills and keeps updated.
10. Is numerate.

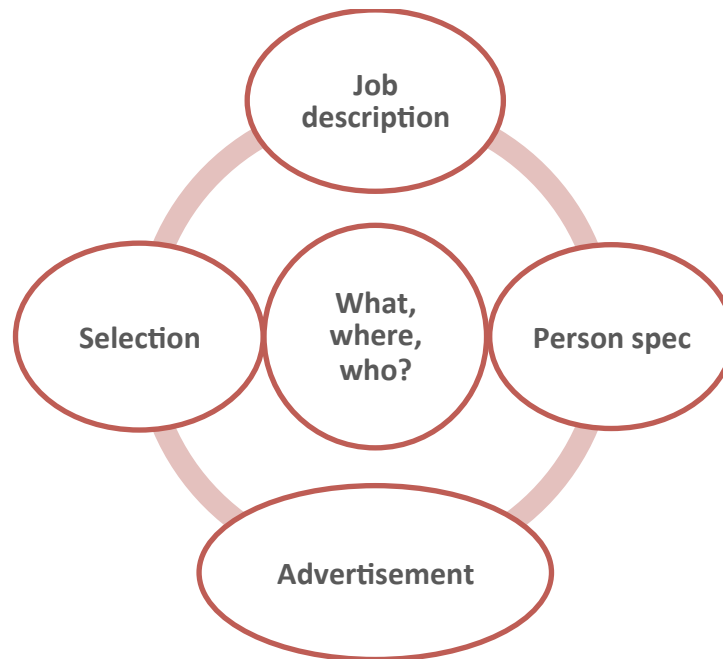
These skills are a combination of people and process skills, most of which can be learned and developed - this is important when it comes to recruitment.

Further attributes for each main fundraising discipline

<p>Individual Giving</p> <ul style="list-style-type: none"> • Creative problem solver • Adaptable • Collaborative 	<p>Community</p> <ul style="list-style-type: none"> • Connection with people as individuals • Passion • Multi-tasker
<p>DM</p> <ul style="list-style-type: none"> • Awareness of statistics • Understands donor groups • Knows how to direct a message 	<p>Major Donors</p> <ul style="list-style-type: none"> • Rapport-building skills • Establishing common ground • Speaks the donor's language
<p>Corporate</p> <ul style="list-style-type: none"> • Tenacity • Energy • Rapport-building skills 	<p>Trusts and Foundations</p> <ul style="list-style-type: none"> • Writing skills • Can interpret scientific reports • Attention to detail
<p>Events</p> <ul style="list-style-type: none"> • Resilience • Networking skills • Team workers 	<p>Digital</p> <ul style="list-style-type: none"> • Understanding of digital audience and channels • Marketing capability • Financial literacy
<p>Legacies</p> <ul style="list-style-type: none"> • Ability to handle sensitive issues skilfully • Calm • Compassion 	<p>Supporter Care/Admin</p> <ul style="list-style-type: none"> • Loves supporters • Is an advocate for them • Can be in their heads

Full lists can be found in Appendix one

The recruitment cycle



Your recruitment and selection checklist

Immediate implementation - recruitment

1. Review your fundraising job descriptions – are they designed around donor-focused fundraising? Do the main duties describe relationship building or processes maintenance?
2. Review your fundraising person specs - do they include the top ten attributes of donor-centred fundraisers, and have you included specific attributes of the fundraising discipline you are recruiting?
3. Review your advertising – are you including attributes as well as specialist skills?
4. Consider widening the market places at which you are looking – many great fundraisers may not be working in fundraising. They could come from a variety of backgrounds that have enabled them to develop the key attributes.
5. Design competency-based questions for the interview to test the attributes.

Longer term - Recruitment

1. Strengthen your networks across the sector, speak at conferences, join a special interest group, and engage with social media to increase awareness of your charity as a great place for donor-centred fundraisers to work.
2. Have jobs advertised on your organisation's website – fundraisers often seek out the type of organisation they want to work for rather than just any fundraising job.
3. Consider the use of agencies – they have people looking for jobs on their books. If you rely solely on agencies, you are missing out on people who are not actively looking but who may be attracted to you by seeing an advert.

The retention cycle



Your retention checklist

Immediate implementation - retention

1. Sign up to an annual salary survey to check you are paying the market rate for your fundraising jobs.
2. Make sure your induction programme helps your fundraisers to orientate themselves to their role and confirm the donor-focused attitude you want.
3. Talk about the donor as well as the beneficiary.
4. Agree on clear and explicit objectives linked to the fundraising and organisational strategy.
5. Establish regular one-to-one and team meetings to create a two-way communication channel to keep you and your fundraiser on track and involved.

Longer term - retention

1. Include donor-centred behaviour in your objective setting - then you can reward it.
2. Establish development programmes for your fundraisers - personal and professional. Consider the opportunities to accomplish this development plan on the job and from working with other people, as well as formal classroom-based learning.
3. Open doors to other parts of your organisation - get your fundraisers out and about, talking to people close to the cause to increase understanding and commitment.
4. Be flexible in your style as a manager - move with your fundraisers - what do they need from me now to develop and become enabled?

5. Consider cross-functional moves – events fundraisers have a lot in common with community fundraisers, corporate fundraisers and major donor fundraisers share similar skills – can you second people to gain wider experience?
6. Build strong, cohesive teams that are focussed, committed, accountable and enjoy healthy debate to create the best donor-centred relationships.
7. Create a trust culture, not a blame culture, to allow mistakes to be learned from and to allow taking risks.
8. Build your relationships around the organisation to educate everyone about fundraising – get fundraising valued alongside other functions.
9. Develop great fundraisers for the sector, and take pride in that - you cannot hold onto them forever, as they need to grow and progress.

Our approach

“We give to you because of the way you treat us.” A corporate donor

Donors don't want to deal with spreadsheet-proficient career fundraisers whose skills are readily transferrable between causes and who see fundraising as just another form of selling. It is vital that the people who fundraise are donor-focused. All the techniques in the world are nothing without the relationship between a fundraiser and the donor. The fundraiser communicates the urgency and importance of their cause and offers the donor a way to contribute in whatever way s/he is moved to make an impact.

To test our assumptions about the attributes of donor-focused fundraisers, where they are found and how they can be retained, we used the following methodology:

- Our profiling tool – Insights Discovery – has been used by a wide range of fundraisers over 16 years; thus, we used it to look for patterns in preferred behaviour.
- Our experience of working with fundraisers for over 30 years.
- One-to-one interviews with fundraising directors, fundraising managers and fundraisers themselves.
- Small focus groups.
- A survey of our fundraising contacts.
- Professional research via Dr Beth Breeze.

Putting the principles and actions into practice

The following are examples of some of our recommendations and observations in action from the people we met, current contacts and clients, and what we have seen across the sector.

Medium-sized animal welfare charity – a networked director and strategic HR

The fundraising management team regularly brings their HR partner into their operational and strategic meetings. This means that, when recruitment is needed, HR is completely immersed in the type of person who is being sought and how that role fits into the strategy. HR interacts regularly with the entire team and thus understand the working context, the language fundraisers use and their approach and attitude. This makes recruitment more focused, and HR can contribute more effectively in interviews.

The director networks extensively on social media and the IOF, which promotes the charity as a great place to work. Jobs are advertised via social media contacts, as well as through conventional channels. The team is also very successful and has won many awards, which makes the charity attractive to job seekers.

Quick review of job adverts

Many job adverts do not focus on donor-centred skills. The typical advert is about the organisation, the fundraising technique and the raising of money.

Some examples of adverts that use donor-centred language are:

Save the Children

“Our Marketing, Fundraising and Communications department exists to inspire millions of people – from individuals to large corporate organisations – to support our quest for change.”

Red Cross

“You will support the development of supporter-led strategies to maximise lifetime value. And when disasters strike, you'll play a leading role in launching our emergency appeals.”

Freedom from Torture

“Your great relationship skills will ensure you open doors for Freedom from Torture”

Where to advertise

Cancer Research UK is well known for widening the net of potential fundraisers. The charity actively encourages people from all walks of life to apply if they have the core attributes required. The charity also have a highly regarded internship programme that is structured to attract graduates and take them through a development programme that includes experience in fundraising – in other words, they ‘grow their own’ fundraisers.

A review of the Alzheimer’s Society’s web site reveals a great showcase that explains why working for them is wonderful. The job page has information about what development the society offers, the benefits of working there and case studies of existing staff.

The interview

Whilst interviewing a fundraising director for our project, he realised that asking a donor-centred interview question is something he had not considered in the past – he asked:

“Can you give me an example of when you have listened to someone and really met their needs?”

This can be asked of any candidate regardless of his or her fundraising experience, and s/he can provide valid evidence of the required attributes.

Retention

We know of many organisations that actively train their managers in good practice pertaining to managing performance, from setting objectives and one-to-one encounters to developing staff, such as Cancer Research UK, Marie Curie, Save the Children, and the Alzheimer’s Society, to name a few. They all use learning and development to embed good management practices to create a motivational environment and build strong teams.

Cancer Research UK has a well-established development programme for their local fundraising managers, which includes a solid induction, volunteer management skills and communication skills

Red Cross, Save the Children, Crohn’s and Colitis UK, Alzheimer’s Society, Mind, Marie Curie and ActionAid are examples of organisations that actively use behavioural models to enable fundraisers to build better and stronger relationships, as well as to enable managers to flex their communication styles to meet the needs of staff.

Shelter used team coaching to enable the heads of fundraising to form a self-managed team, which fostered trust and cross-team working across their division. This developed leadership skills, as well as providing a strategic outlook for these managers.

The Outward Bound Trust has developed a very strong leadership team that fully embraces fundraising as part of the mix. The trust has done this by working on team dynamics and regularly health-checking their performance as a team, which they see as a vital part of their success. The director of fundraising cascades this approach down to his senior team to ensure the members are able to function at a strategic level with their colleagues across the trust.

Links to other projects

The main link is to the CDE project 17, Leadership. It is clear from discussion with the project leader that fundraisers grow and thrive in an environment of enablement and empowerment. The analogy is one of a gardener growing people, which means paying attention to creating a motivational culture in which fundraisers can thrive.

Appendix one

The full lists of attributes of a donor-focused fundraiser drawn from the surveys and focus groups we conducted.

1. People skills
2. Cause driven
3. Adaptability/agility
4. Listening and responding to donor needs
5. Genuine/authentic/integrity
6. Quick thinking
7. Drive and resilience
8. Well organised
9. Technically skilled
10. Numerate
11. Empathetic
12. Curious
13. Networking skills
14. Good team worker
15. Analytical
16. Marketing skills
17. Creative.

The full list of attributes for specific fundraising techniques drawn from our survey and focus group

Community

- Connection with people as individuals
- Passion
- Multi-tasker
- Thinks on their feet.

DM

- Awareness of statistics
- Understands donor groups
- Knows how to direct a message.

Corporate

- Tenacity

- Energy
- Rapport-building skills
- Finding common ground
- Speaks the donor's language.

Trusts and foundations

- Writing skills
- Can interpret scientific reports
- People skills do matter as there is a potential crossover to major donors
- Attention to detail
- Highly organised
- Research skills
- Happy to work alone
- Clear thinking
- Process skills.

Legacies

- Ability to handle sensitive issues skilfully
- Calm
- Represents the organisation well
- Compassion
- Has a strong moral compass.

Supporter care/admin

- Loves supporters
- Is an advocate for them
- Shows empathy.

Events

- Resilience
- Networking skills
- Team workers
- Customer service
- Appreciative.

Digital

- Understanding of digital audience and channels
- Marketing capability
- Financial literacy
- Agility to adapt to an ever changing market.

Major donors

- Rapport-building skills
- Establishing common ground
- Speaks the donor's language
- Outgoing
- Confident
- Charisma
- Gravitas
- Wants to be with people.
- Happy to work the room.

Appendix two

Examples of donor-centred behaviour in fundraisers as described to us by those we interviewed

- Sending a handwritten note to a legacy pledger who had recently lost a good friend.
- Our DM fundraiser is donor centred in that she carefully approaches each activity with the aim of giving the donor the best possible experience in terms of materials and seeing how their donation makes a difference, through to making a donation and being thanked.
- I know a fundraiser who writes highly personal thank you notes, is brilliant at telling stories specific to each donor, brilliant at keeping records and showing real care, has obvious interest in the donors and attention to detail. She focuses not on what she wants, but on what the donor wants. And she's passionate about the cause.
- A major donor fundraiser who continually found ways to engage, update and involve funders and potential funders. Both directly through personal contact and by providing 'inside access' to high level staff, new and emerging plans and ideas.
- Personally delivering a bouquet of flowers on a donor's 70th birthday.
- Sending off a birthday card to an elderly lady who she had spoken to on the phone earlier that day.
- Build understanding of donor motivation and needs.
 Tailor interactions to fulfil these needs.
 Every response (even the negative ones) is valued
 Provides options and opportunities for engagement.
 Personalised approach.
 Expresses impact in personal (not organisational) terms
 Stewardship is donor defined (frequency / channel / content).

- Representing donors' view in a large charity and renegotiating service delivery as part of a gift.
- I have a major donor manager who is extremely donor centric. Excellent interpersonal skills combined with an ability to identify what the donor needs. Those needs are then skilfully met often using others and ensuring they are extremely well briefed.
- Head of alumni fundraising is the voice of the donor in every conversation we have. We want to be sure the donor is heard.
- A legacy fundraiser who knows the supporters so well and has a genuine relationship with them. They're people, not donors, they're called by name and treated as part of the family.
- The relationship between YouthNet and Vodafone. The fundraisers who worked on the account genuinely tried to meet the needs of the business and understand what the partner was trying to get from the relationship. Worked with them and assigned the right people, rather than having a transactional relationship.
- All our donors are friends. They're in our phones, we text and WhatsApp them. We go out to dinner with them. We are invited to their major events and asked to speak. We appeal to their preferred medium of communication. They tell us "We give to you because of the way you treat us."
- A fundraiser with a close relationship to her donors. She remembered their birthdays and things they liked - she brought one some maple syrup back from Canada once, sent them articles they may be interested in. More informal, less corporate.
- A trust fundraiser who was applying for a £50 k donation. When she met with the trust she was totally in charge and scrupulously researched. She impressed them with how she'd understood them and the application.

Appendix three

Research sources

- Insights Discovery profiles - based on the work of Carl Jung, these profiles measure behavioural preferences across a range of fundraising disciplines. The model is accredited by the British Psychological Society.
- One-to-one interviews with a range of fundraising directors, managers and fundraisers themselves. Ten people were interviewed using standard questions.

- Focus group – conducted at the IOF Convention 2016.
- Dr Beth Breeze, Director, Centre for Philanthropy, School of Social Policy, Sociology and Social Research – her work on the attributes of major donor fundraisers
- Survey – conducted via an email link to a mailing list of approximately 800 contacts with 24 responses.

Appendix four: Insight profiling

The Insights Discovery model

Insight Discovery is a model that measures behavioural preferences. It uses a system of four colours to describe different styles of behaviour. Brief descriptions of the four colours are:

Fiery red – A style that is high in assertion, drive, bold and straightforward communication, a preference for taking charge, getting things initiated and being brave. People high in fiery red energy are comfortable being in charge, leading others and, when they play, they play to win.

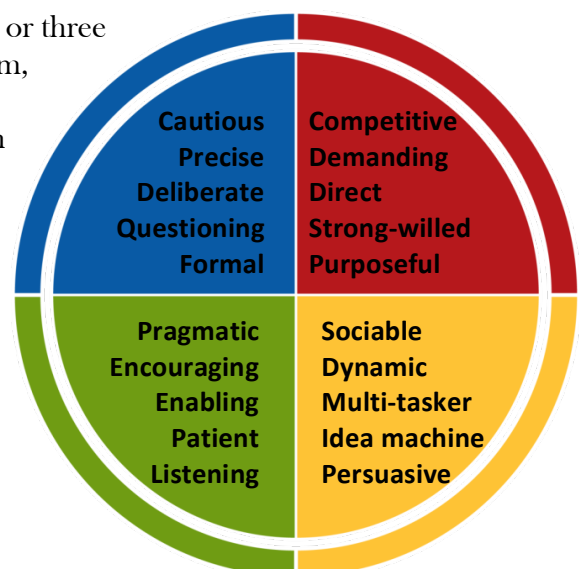
Sunshine yellow – A style that is high in positivity, sociability, warmth and ease with people. Those with a strong preference for this colour enjoy engaging with and influencing others, tend to have strong communication skills, are outgoing and enjoy team working and the social side of life.

Earth green – A style driven by the desire to enable others and facilitate development and success. People high in earth green energy are skilful at listening, identifying needs, building relationships slowly and meaningfully and giving and receiving trust. They have a strong preference for rolling their sleeves up and getting things done pragmatically and competently.

Cool blue – A style that is high in analysing, questioning, doing things to a high standard, getting things done right and focusing on detail. Those with a strong preference for cool blue are socially more formal, deep thinkers, comfortable with complex data and skilled at spotting flaws and errors that may hamper excellence.

Colour energies working together

When we come to work we can show up with one, two or three preferred colour energies. We have access to all of them, yet choose that which is appropriate depending on our work and our innate preference. 55% of the population have a ‘classic’ profile – that is, the preferred use of two colour energies that are well within our ability. Some of us have a ‘focused’ profile whereby we are dominated by one of the colour energies. If you have an ‘accommodator’ profile, three colour energies are used. Whilst this often enables us to be adept at more types of behaviour, it can also be stressful, by definition, we will be pulling on two opposite energies. Prolonged use of three energies can be difficult to maintain.



Uses of the Insights Discovery profiling tool

All behavioural models are limited and thus need careful use. The best use of the tool is in teams in order to understand the strengths and potential development areas of team members to ensure the team works well and draws on all its resources. It is also very useful for interpersonal challenges pertaining to relationships that have become difficult or in building a relationship from scratch. After that people need to be allowed to be 'whole' people, not a collection of letters or colours.

The model is not useful in recruitment - many candidates would fill in the evaluator according to what they think the recruiter is seeking - this is not dishonest, just pragmatic. The model does not test aptitude - it tests preferred behaviour, making it less useful as a guide in recruitment.

We have included wheels of individuals from several fundraising disciplines as an interesting way of attempting to see whether the fundraising technique drives the preferred behaviour of individuals within that function. These diagrams can also be an indicative of the type of individuals who are drawn to different fundraising functions.

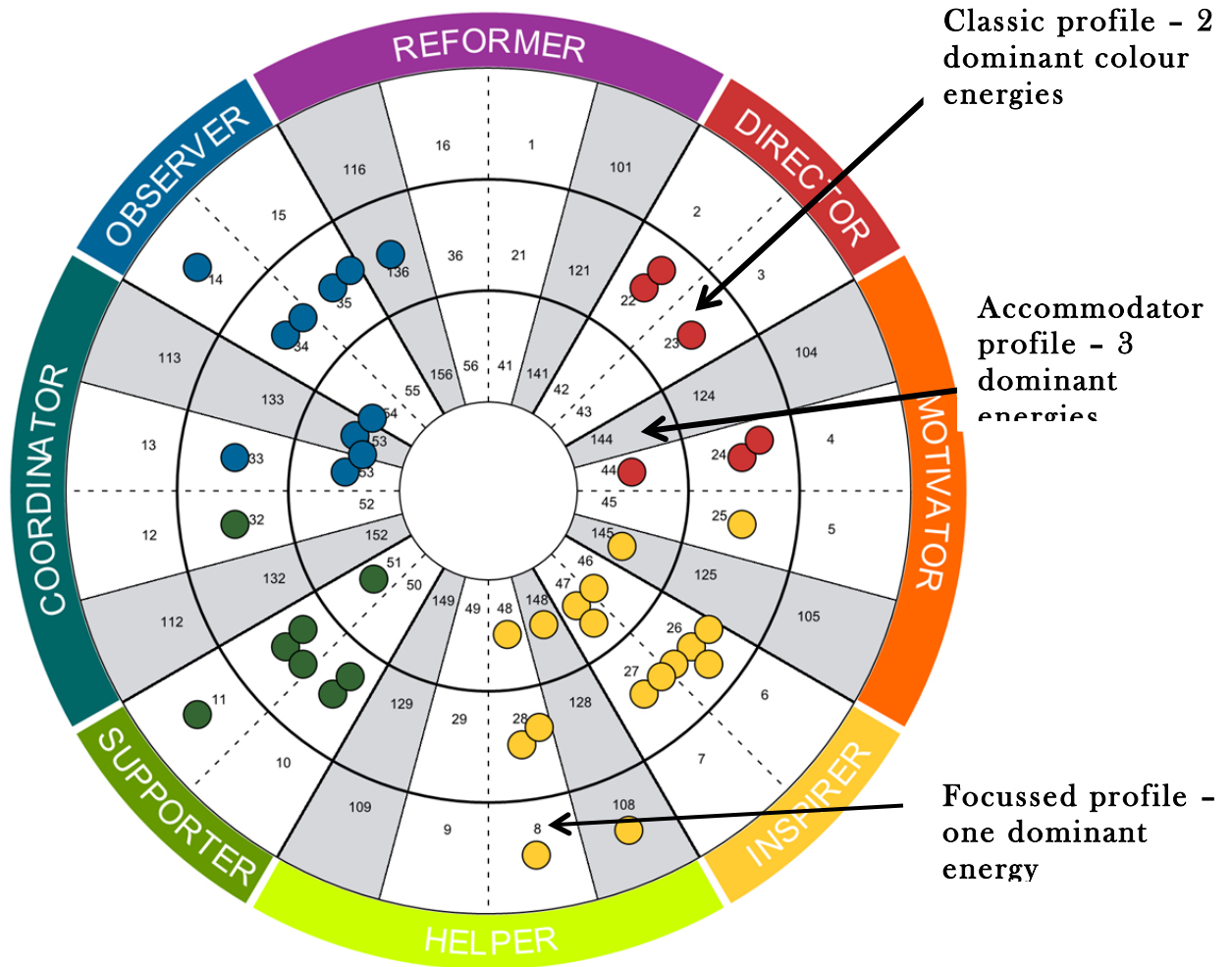
In terms of using the model in fundraising teams, it is useful for managers to understand what drives their fundraisers and how they would like to be managed in the light of this in order to get the best out of them.

Insights, colour energies and fundraising disciplines

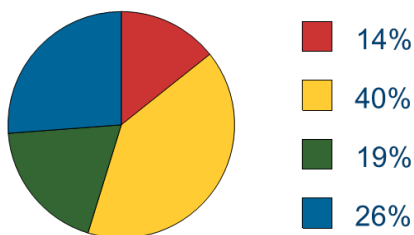
From our profiling, we can see the following themes:

Individual Giving

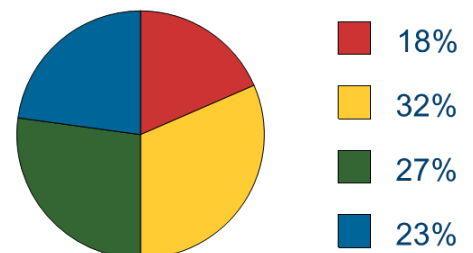
Individual Giving - In this group, we observed a variety and a real mix of preferences. It takes all sorts to make an individual-giving fundraiser! We can observe a preference for feeling rather than for thinking, which may be manifested in how fundraisers work to influence donors - in other words, they are likely to be more comfortable winning hearts than heads.



Dominant Energies

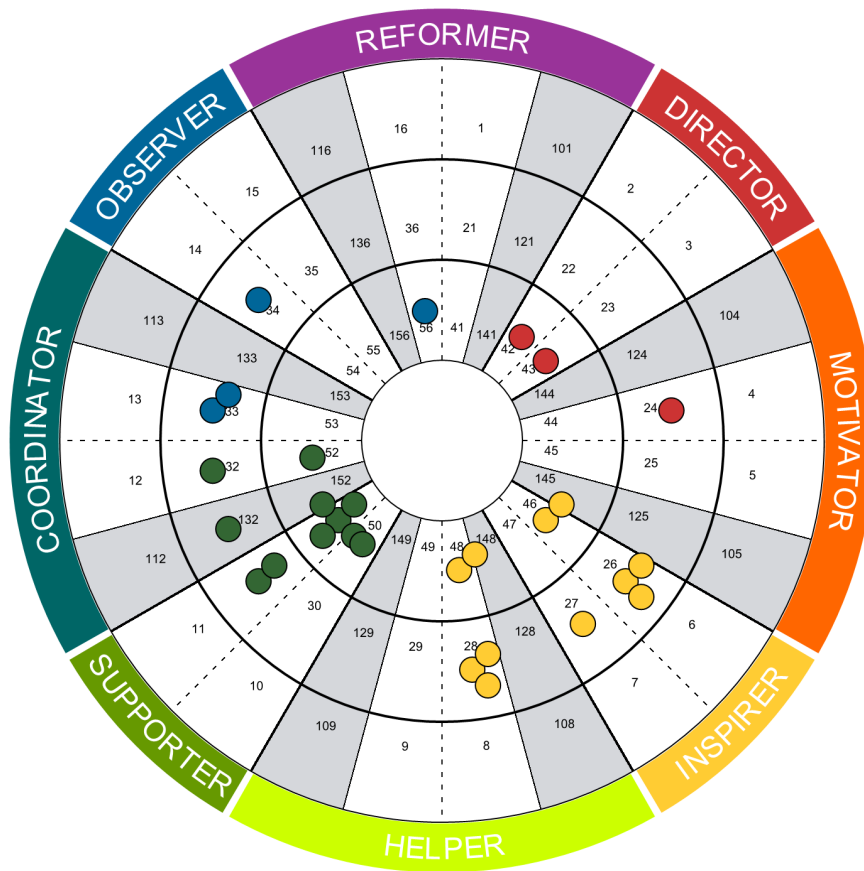


Inclined Energies

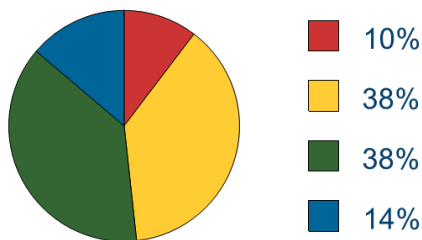


Corporate fundraisers

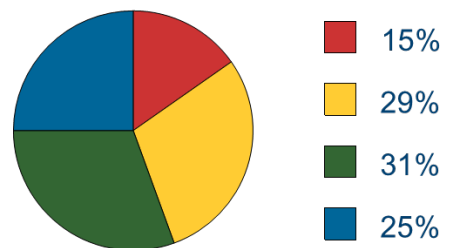
Corporate fundraisers have a stronger preference for earth green and sunshine yellow energies, making them natural relationship builders. They can be more introverted or more extraverted but, either way, they will have strong people skills, be able to listen well, respond to needs and build genuine and enjoyable relationships with donors. They may have to work harder to assert themselves when they need to or to knuckle down to measure and evaluate their fundraising. They have a strong ability to adapt – “curious chameleons”, as one of the fundraising directors we work with put it.



Dominant Energies

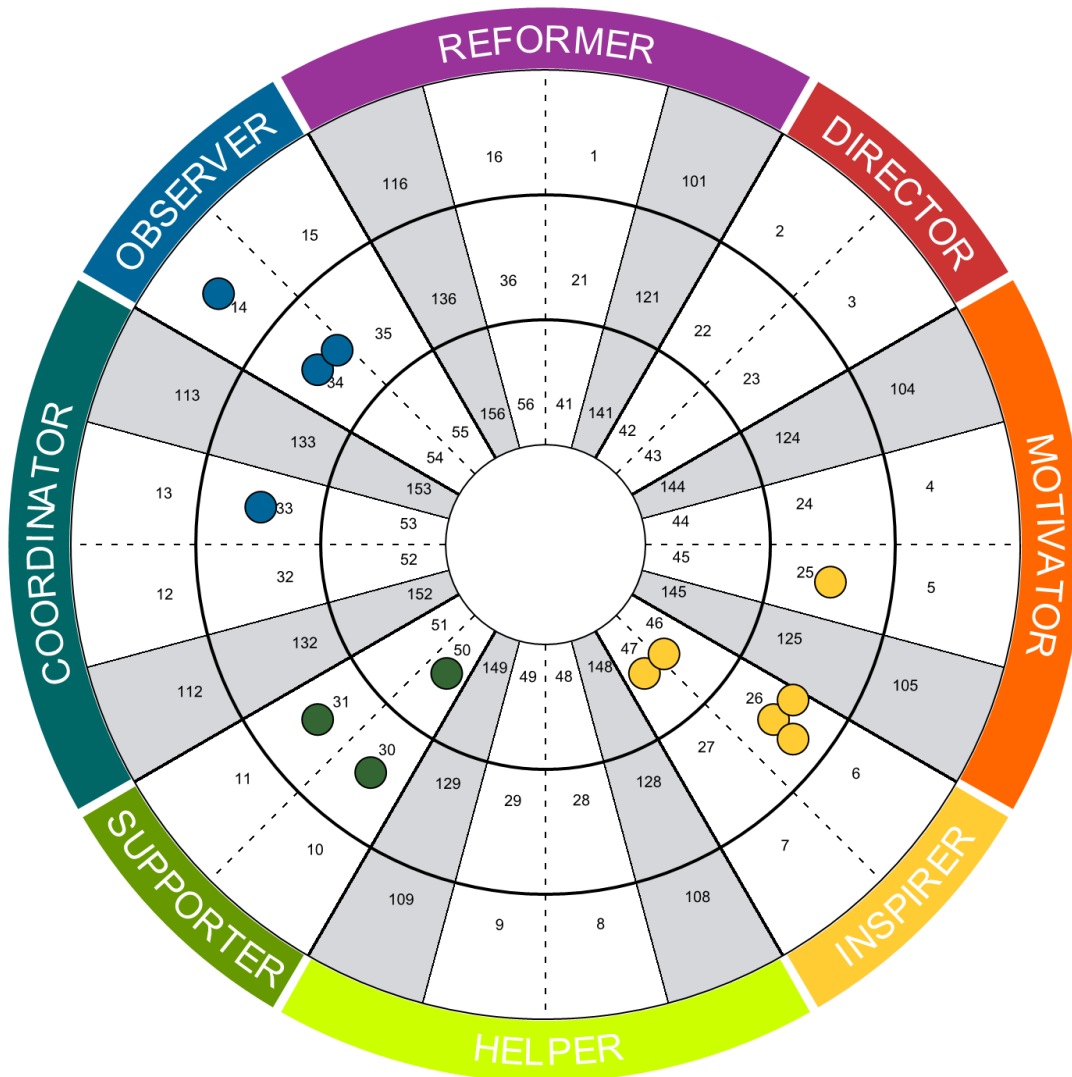


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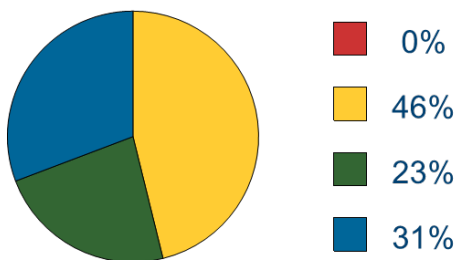


Community

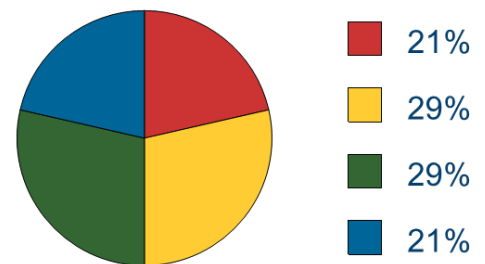
In this group, we see a preference for the practical and low key. Community fundraisers can be outgoing and spontaneous; however, they also have a strong preference for caring, putting others first and being known as reliable deliverers – they can be trusted and they do what they say they will do. They have the ability to empathise with the donor and to meet people as equals. They may struggle to be assertive or single minded when they need to be.



Dominant Energies

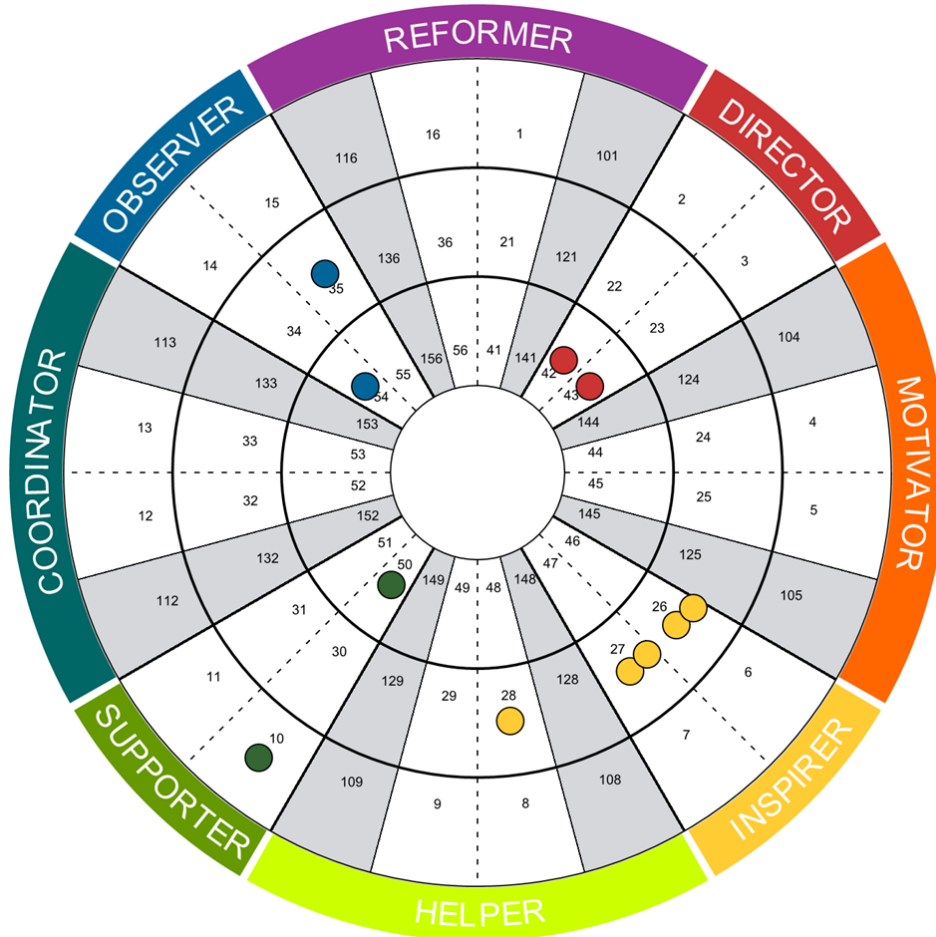


Inclined Energies

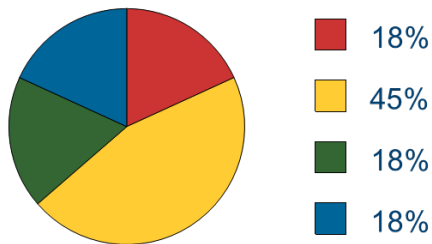


Digital

A variety of styles are seen here, although there is a dominant Feeler tendency that is related to building relationships, networking and empathy. There is a generation of ideas in the high yellow energy and a fast thinking style combined with red energy to keep up with a fast moving area. The blue energy enables some evaluation and measurement.



Dominant Energies



Inclined Energies

