Executive Session:

Fundraisers Expected To Have Certain Skills

Technology expertise and strategy have become standard

Fundraising has morphed from a band of volunteers and lower-level staff crafting solicitations to professionals who are schooled and credentialed in the discipline. It is to the point where there are career channels and career specializations within the fundraising profession.

The most dramatic change is in the direct response fundraising area where generating and understanding data, technology and social media have become as vital as the fundraising message sent to donors. Finding the best pool of potential donors has always been key. But now the education, training and skills required of fundraisers to make those selections and to develop those strategies has become standardized and required.

The challenge is not allowing skills such as building a good letter and face-to-face contact to go to seed. Landing a senior-level job in fundraising today requires professional training and moving along in your career requires the ability to network and market yourself.

The NonProfit Times recently convened an Executive Session discussion in Washington, D.C. Around the table were an executive recruiter, someone who had just been recruited to a senior fundraising position and the chairman of the nation’s largest fundraising agency who also hires fundraisers. Their insights are a blueprint to building or enhancing a fundraising career.

The participants were: Jennifer Dunlap, president & chief executive officer of Development Resources, inc (DRi); Tom Harrison, chairman of agency Russ Reid; and, David Strauss, a former agency chief executive now director, membership fundraising for The Nature Conservancy. The discussion was led by Paul Clolery, editor-in-chief of The NonProfit Times, and Rick Christ, a vice president at Amergent.

Paul Clolery: We're in Washington D.C., where so many nonprofits are located. It seemed to me that it has been musical chairs. Somebody gets up and goes somewhere else and drops down. Somebody else goes into the open spot and it's the same nine people. They're just in different jobs.

Is that a correct perception? Are we just seeing musical chairs in cities? Tom, you run the largest agency in the space and hire a lot of fundraisers. What are you seeing?

Tom Harrison: I think that it might be true in Atlanta. They've got a concentration of nonprofits, a concentration of people. A number of people have migrated between the nonprofits.

When I look at the broader scope, Washington, New York, Chicago, the West Coast, and Dallas, I think that there's been a great influx of people from different areas, from corporate side and with different experiences who are coming into both nonprofits and agencies. We see this in fundraising, in branding, and in some of the other areas.

So yes, there's still going to be some of those core people we know. If you start by looking at them and their career path, you'll see they're going to positions of increasing responsibility. That's normal and I think that's good. But, I think there's also a huge influx of people from the outside who have come in and, in many ways, are making our industry better.

Clolery: Without calling a name, there's this one trade show and there's an individual who we'll call Joe. We would say it's the Joe Factor, because literally every year Joe would be at a different booth in the same industry.

Are we seeing that anymore? Are people still, for some reason, being able to bounce from job to job, or is there now becoming a level where you really need to be competent at what you do? Has the competency level increased?

Jennifer Dunlap: Just tying these two things together, I think, people are less mobile than they used to be. We are not seeing as many people willing to relocate and move from city to city to city as they used to be.

Rick Christ: I'm fascinated by that. Why do you think that is?

Dunlap: Some of it initially was what happened in 2008 (the recession), and I think that changed a lot of people.

Christ: They're stuck in their houses.

Harrison: Or, they have kids in school. It's very tough to pull your kid out of school and change to a new place.

Dunlap: They are stuck in their houses. They realize maybe they didn't want to take a chance, if they were in a solid, supported position where they were well-resourced, they had the respect of the board, the respect of their CEO. So people have become a little less mobile.

Second, I think we are seeing people come in from the other industries. We're not growing enough of our own people. We're not investing in them. We're not training them within nonprofits the way we need to be to fill the holes.

I came up through the nonprofit sector. I was invested in and taught, 10 years at CARE, almost seven years at Red Cross and they invested in me and taught me how to become the vice-president.

Nonprofits aren't doing that as much anymore and they need to be. We have to be growing our own. We have to be bringing people in from the outside because there aren't enough good people for all the jobs that are open.

Clolery: Everybody is setting up sideline offices. I've known some of these people for almost 20 years, and you find out that John Smith is now living in Colorado Springs and he's still working as well as he did in a job that's in another city. You're seeing somebody now living Florida who used to work in Chicago, but they're splitting their time between the two places, and still running their agencies.

Is it an agency issue where people are more mobile and that the nonprofits are less mobile? If you're running your own business, on the fundraising side, are those people more mobile?

Dunlap: I was speaking about the people we try to recruit and put into the nonprofit positions. I think that technology and a whole bunch of things have allowed folks who own agencies and are senior people in agencies to work from different locations. It's given them the flexibility that they wouldn't have had before.

But there still is an issue of people. There's still too much of an acceptance of short tenures in positions, instead of really staying, and learning the business, and being a part of the culture, and building relationships. There's still too much turnover in that 18 months to two years.

Christ: I had a boss once who said it's much harder to fire somebody than it is to hire somebody, which is why it's so hard to hire somebody. In other words, you don't want to get rid of them, so you want to make a good choice.

Now, he fired me, so obviously he got over it. But it seems to me that it's harder still to retain somebody, to give them increased challenges, to keep them satisfied, to keep them there, and to groom them into a position, into their next position, to meet their capabilities and your needs, and to bring them up. I think the failure to do that is, for the most part, what stimulates people to decide to look elsewhere.

Dunlap: Well, they're mobile. People can move around from organization to organization within a city. And the younger...
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you are, the more mobile you are, right? But it’s the senior level positions where people aren’t as open to making big moves as they used to be.

Harrison: We’re seeing geography as a big issue. Historically, we’ve hired people from everywhere and brought them to California. We make a few exceptions with people who are just so exceptional they can live in Seattle, they can live in Chicago, they can live in Boston. They’re just too good to pass up. We now have an East Coast office. We have a Toronto office. We’re able to recruit more people in those places.

For a while we were saying it’s a digital age, let’s let people live wherever they want to, but we’ve changed our mind. We believe that creativity is collaborative, that you need to be in the office, you need to be managing a team, that you need to be learning from people in the office.

Dunlap: I would agree with that completely. You can see the difference. And this is the point within fundraising, it’s a team sport. You’re part of a team with the CEO, with the board, with the other staff. It’s when those partnerships are working that the program is growing and thriving.

And if you’re in a program that’s growing and thriving, you are being given new opportunities and new challenges. Maybe not a new title, but you can be given more money. People can be invested in ways that make them want to stay and be a part of organizations. I think that’s where the industry’s got to move.

Harrison: They need to be with the team. And so, yes, there are exceptions, but we still have even these people coming in the office every other week for a week. But for the most part, we want our people together.

Clolery: David, you made the jump from agency to nonprofit. What differences do you see in the fundraiser at the agency versus the fundraiser at the nonprofit, if they’re in a similar position in both places?

David Strauss: There is a greater sense of ownership for employees working on the nonprofit side. They are more in tune with the vision and mission of the organization.

For an employee working on the agency side, there is already a natural disconnect between the employee and the organization(s) for which they are working. The goals and values don’t always align. Another challenge is understanding the politics and business decisions within an organization. An agency employee is not always privy to the context behind the decisions.

Clolery: Are you looking at two different types of people for those roles?

Strauss: On the agency side, you look for someone who is strategic and service-oriented, depending on the role within the agency. On the nonprofit side, collaboration is key to success and to move the needle to make greater impact outside of your area of control. Rather on the agency side, client service is key to deliver something very specific to an organization.

Clolery: Are the agencies and the nonprofits competing for the same people?

Strauss: Yes. I certainly see them crossing over back and forth.

Dunlap: I see a couple things happening. I think it is a different kind of person. The inside folks who do really well are those who like to be inside people. They like to be part of that group. They like to be part of the strategic direction of the organization, know the board, they know how to deal with the politics and like dealing with the politics inside an organization.

Some of the agency folks left it because they don’t want to deal with all of that. They want to just deal with the craft and just be advising people on the craft, not be part of an organization. I think those who are really successful in both, they are different types of personalities.

Strauss: You have more control of specific outcomes within your sphere of control on the nonprofit side. As an agency, there is more selling and negotiation to get an organization to move in the direction you are proposing.

Harrison: I’ve seen superstars at nonprofits move to the agency side and be disappointed by the experience. When they come up with an idea at their nonprofit, everyone does it. On the agency

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From soup kitchens to culinary schools to higher education, Sara Pandolfi has served as a fundraising consultant for a plethora of grateful nonprofit clients. As a student in the M.S. in Fundraising and Grantmaking, offered by the NYU School of Continuing and Professional Studies (NYU-SCPS) George H. Heyman, Jr., Center for Philanthropy and Fundraising, she has taken her career to the next level, through classes that provide the knowledge base and skill sets that are immediately applicable in her work. Through cutting-edge curricula in digital and social media, she has expanded her ability to reach and to cultivate donors in a whole new way. Best of all, convenient course schedules allow her to work full time while earning her degree.
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side, when they propose an idea, clients say “maybe.”

Strauss: Yes, I was frustrated by it.

Clolery: The model fundraiser, if you were to put this person together and have an image of them right here on the table, who would that person be if it’s on the direct response side?

There are all these credentials that are out there now; CFRE, ACFRE, the one that the DMA’s now touting. Do they really make a good fundraiser or are you looking for somebody else?

Strauss: It depends on the role. If it’s within an organization, I think you want somebody who probably has strong strategic and management skills. If you’re on the agency side, it’s probably somebody who has a strong negotiation/sales background, who is open-minded and strategic.

Harrison: If you’re managing a bunch of people, you need strong management skills, but if your primary function is engaging with a client and solving a problem strategically, that requires a different set of skills.

Strauss: That’s right.

Dunlap: All of those certifications are nice, but it really also comes down to staying power. Are they a relationship builder? Do they know how to work collaboratively within an organization? Do they know how to grow a program? You can only get that information from looking at what they’ve really accomplished and in talking to them and interviewing them. Those certifications don’t guarantee that.

People will say to me, “I want someone with this certification, this certification,” but, you know, if they’re not the right cultural fit and they’re not really a builder and they’re not really where I want to be, that’s not going to help them.

Harrison: Nonprofits used to hire people because they liked to work with people, or they were committed to the cause. They’re not doing that as much anymore. I think they’re doing a much better job.

The most important question to ask somebody when you’re interviewing is, tell me about a time when you did this exactly, successfully or not successfully, and what happened, not what do you think you might do. But, what did you actually do?

And, look at the proof. If you want somebody to build a sustainer program, hire someone who has built a sustainer program. If you want someone to do a major gift, hire someone who has done major gift.

Dunlap: Or, train a person inside who’s talented, smart, committed to the cause, has demonstrated that their a relationship builder, fit in the culture, and train them how to build a sustainer program.

Strauss: This goes back to your initial question — why is Joe going from Job A to Job B to Job C, and then back to Job A again? The direct response fundraising community is niche and we tend to look within this community for the “best” people available. We are tentative to step outside of this pool of people.

Do you go out and hire someone who has a corporate or commercial background to do fundraising? You can, but there is an inherent risk involved.

Dunlap: I think CEOs and heads of organizations need to be better educated on how to run and manage fundraising functions, what they really should expect, how it really should be managed, the real metrics they should be looking at for performance indicators if there is a culture of philanthropy in the institution.

Dunlap: You wrote an article about staff turnover in the fundraising field. So, part of it is good people can get into organizations and they don’t find fertile ground to build a program. They’re not resourced correctly. The expectations are skewed from what can be done, when it can be delivered.

We have folks who are spending too short stints and not really learning the business so that they can deliver, and then we also have expectations of the nonprofits that might not be correct.

Harrison: Jennifer, you made the point earlier that there are more job openings and opportunities because of the growth of the sector than there are people experienced in the sector, and I agree.

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just hired someone who has never worked in a nonprofit, but she worked at Disney and she was the digital creative lead at Williams-Sonoma on its catalog. What we want from her is her digital experience, her catalog experience, her e-commerce experience. We've got 300 other people who can teach her fundraising.

Strauss: Do you find that that is a risk in itself that you're bringing somebody in from the commercial side? I've seen time and time again where you bring in that commercial person and it's a 50/50 shot that they're going to actually make it on the nonprofit side.

Dunlap: Because they're not on-boarded correctly. If you're going to bring somebody in from outside of the sector, they've got all the right skills, but they don't know how to do it in the sector.

Harrison: You've got to wrap your arms around them so they can't fall too far.

Dunlap: We're going to give you a management buddy. We're going to lay out with whom you should talk. We're going to make you successful, as opposed to dropping in in to sink or swim.

Harrison: You're so right. It's not just about recruitment. We focus a lot of attention on recruitment. We've hired a full-time internal recruitment person, who used to be a headhunter. We brought her inside because we recruit so many people, but it's not just about recruitment. It's about exactly what you just said ... when you actually have the on-boarding piece?

Dunlap: How do you on-board them? How do you train them?

Harrison: We've got a buddy program. Each new employee is matched with someone from another department so that they can learn the ropes. We've got a new employee orientation. We've created something called Growing U. Last year we did 200 classes within the agency, sometimes with outside speakers, sometimes inside, on almost anything you could want.

If you said, “I need to do better at Excel,” or at analytics, or PowerPoint, we'll find the right teacher for you.

Dunlap: We're finding in the search business that recruitment is one piece. We spend more time understanding the real needs of the client, the real program. Do we need to shift it? Do we need to change it? Do we need to advise them on that?

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geo-targeting who might be interested in doing something with your organization?

Harrison: I just used some shorthand, obvious examples. But, you’re right. My mind went to the technology. We’ll also do things on how to negotiate better, how to run a meeting better. We’ve got a curriculum of things and then we offer people the chance to say what else they need.

Not only is it a technology issue. I think that retention and growth has as much to do with culture as it does with skills. We want to teach them skills, but the culture is really important.

So, for example, our Chief People Officer instituted a program called Live It, Give It. We say if we’re in the fundraising business, we better believe in it. We better do it ourselves. We’ll match gifts of any employee to any nonprofit.

We give them three paid days off for volunteer service. It doesn’t have to be for a client. And every month we’ll arrange an event. We’ll say, “who wants to come down to the local rescue mission and serve a meal? Who wants to come down to the Habitat event and build a house?” The first 50 people that sign up are in.

Dunlap: What Tom’s describing within his organization is building his team engagement. These people are integrating with each other. They will begin to have common approaches to how they do things. That makes an organization work more effectively. It makes the employees feel better about being there.

Cloley: Let’s go back to my original question, which was how much is technology driving today’s fundraiser? You used to be able to write a great letter. You were good with people, so you could go talk to them about major gifts. How much of that now is all technology?

Harrison: Technology is very important. You still better be strategic, reactive and relational. One of the most important benefits of technology is how it allows us to do deeper analysis. Increasingly we’re seeing analytics play a role in everything, not just in the “analytics” department that we used to see, but the account people, the creative people, the media people who are analyzing audience. Everybody better understand the technology of it. It allows us to turbocharge the effectiveness of the programs.

Cloley: It used to be ZIP sort and you could target a ZIP. Now it’s called geo-targeting. Crowdsourcing is designed to get people up and moving but now they’re giving away premiums on crowdsourcing sites to get people involved.

Strauss: There are lots of techniques, but to iteratively improve your business you need the analytics. If you’re driving $100,000, how do you improve your ROI? A big catalyst is the use of analytics. Creative can provide you with a big win, but analytics is the driving force behind the changes to a program.

Cloley: Getting back to the human element, what does the fundraiser that you’re looking for need? Do they need to know WordPress? Do they need to know Excel? Do they need to know the entire Microsoft Suite or the entire Google Suite? What do they need to know today to get a job?

Harrison: And on top of that, they need to be very facile in working in social media and in digital.

Dunlap: I think it depends. We’re talking yes in the direct response piece. But even in the major donor piece, you need to understand all that. You need to be data-driven. It’s not the depth of analytics, necessarily, that we do on a large direct response campaign. But you still need to understand performance and you need to understand what motivates your donors.

You just have to do it differently on the major donor side than on the direct response side. You need fundraisers who know how to use an Excel spreadsheet. Even just a normal major gift person or a development officer needs to be able to analyze the business and how it is doing.

We now have wonderful technology that can drive us down into the donor files in a way we previously could not. But you’re right, some of the old, tried and true, how you build relationships, what’s working, keep trying new things, all of that needs to constantly be brought back and applied. Any organization that’s one-dimensional is not going to survive.

Harrison: I hope we never lose the human element. The human element is absolutely essential and it’s what motivates us when you think about the nonprofit and what we’re doing to make the world better and why we get up in the morning. The human element is essential to it.

But with increased growth, we have increased specialization. You’ll have some people who are going to focus more on the analytic side and some people on the human side, but everybody needs to know everything.

Where we learned that was in digital.

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So, 10 years ago we thought, okay, “Digital is the way of the future. We’re not going to throw out any of the old stuff, but digital is the way of the future. We better get good at it. Let’s have a digital department.”

We soon realized that we didn’t need a digital department. We needed a digital agency. We blew up the digital department. We took the digital creative people and put them in creative, and digital analytics people and put them in analytics, digital media people in the media, so that they would infect — my word — the whole agency. Now it would be rare to hire a creative person or an account person who didn’t understand digital too.

So, you’ve got the human element but you’d better understand the building blocks. It’s almost the price of entry. You better understand the broad skill set and then on top of it, are you innovative, persuasive, articulate. That’s the kind of stuff that makes the difference between a good employee and a great employee.

Cloerly: You said a great thing, point of entry, the price of admission. Give me a checklist. What’s the price of admission these days to get a fundraising job at a mid-level?

Dunlap: It depends on the kind of fundraising job, right? If you’re talking about a mid-level development officer who’s got to know a little bit about everything, they need to have been a part of a program that they can demonstrate success over at least a three-year period.

They have to show how they grew and were part of that program. They need to be able to prove that they know how to work within an organization. They need to prove they know how to build relationships internally and externally. They need to prove that they understand where the industry is going. They’ve kept themselves relevant. They understand all the different pieces of what’s happening. They also need to be able to evaluate and translate for the CEO and the board the success of the program.

Harrison: And they’ve got to know how to run an Excel spreadsheet, right?

Dunlap: That’s sort of the basic. If you can’t do Excel or you can’t do PowerPoint, or you can’t do Microsoft Word, you’re not the fundraiser today that you need to be.

Strauss: The expectation when you hire a mid-level manager is their familiarity and knowledge of the basics. You already make an assumption that they have a working knowledge of Microsoft Office.

Dunlap: How you manage the younger, more technology savvy employee is different than how we have managed employees in previous times. They’re thinking about a million things at a time, and they can be thinking here and here and here. We think if they have five things up on their screen, they’re not working. That’s probably not true because that’s part of their creative process and their thinking.

We need to understand this generation that’s coming through, too, how they work and how they need to be managed.

Cloerly: We’re lucky. We’ve got some tech folks who can actually write. But, more and more I’m seeing press releases and information coming from agencies and from nonprofits where it is clear the writer could not find a complete sentence with a flashlight and a map. They’re tech geniuses but they cannot write a sentence.

Dunlap: But I think internally within nonprofits, it is primary to the job because they have to communicate internally, too.

Strauss: Yeah, I would agree. That’s true.

Harrison: Writing isn’t just about writing. It’s about communication. Often the way people write is the way they talk, and so if they don’t write clearly, they...

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might not speak clearly, either.

Clobery: Five years down the road, what are some of the skills the fundraisers don’t have now that they will need?

Dunlap: Obviously the technology goes without saying. Donors now can have more access to information and they can sometimes know more about your organization than you might have thought you needed to know. You need to have a full grasp of your organization and understand the financial reports, the Form 990s, what all the benchmark agencies say about you. You need to understand that in a way that maybe 10 years ago you didn’t.

What I’m concerned about is we’re losing the relationship piece. The industry is changing and how we raise money is changing. So our clients don’t know what it’s going to look like 10 years from now, but I think if our folks at least come with the core of what it’s going to take to be successful in an organization, which is part of curiosity, innovation, and constantly be willing to bring in the new ideas from the outside, they can be successful 10 years from now.

Harrison: You’re exactly right. I don’t think we can predict what they’re going to need to know, or what skills they’re going to need. They better be passionate about the cause. They better be persuasive, curious, innovative, relational. If they have those things I think they can figure it out.

Clobery: Tom, over the years I’ve heard fundraisers, whether it be on the agency side or on the nonprofit side say, “We just can’t get kids to give any money. How are we going to get the youth today to be philanthropic?” We’ve found out that they don’t become philanthropic until they become their parents.

Dunlap: This is not a new problem.

Clobery: How do you hire somebody into an organization who might be young, who’s going to be writing or communicating or fundraising to somebody 30 years their senior with whom they couldn’t communicate at home?

Harrison: You have absolutely nailed it. When I joined Russ Reid 30 years ago, one of my first meetings with Russ, I said, “Our clients were just talking to us and they’re saying these Baby Boomers won’t give. All these older people are giving and the Baby Boomers never give and they’re going to go out of business and what are they going to do?” And Russ looked at me and he said, “They’ll give when they turn 45. Don’t worry.”

And, of course, now people are saying, “Well the Baby Boomers give, but the Millennials won’t give. What are we going to do?”

When we ask young people to choose a celebrity spokesperson, or choose media, or choose music that’s going to go with a TV spot, they’re picking the wrong celebrities and the wrong media. They want it to be young, hip, and cool, just like they are, and that’s not the target audience.

It comes down to basic communication strategy. If you learn communication, you know that the first thing is the audience:

Know your audience. And these people, whatever age they are, they have to know their audience. If they understand that the audience is 45 plus, they’re going to need to speak to them with things to which they can relate.

Where are we finding great employees now? By far our employees are coming from referrals. It’s somebody else who knows somebody else, especially at the senior level. It’s all about referrals and people referred in. Second is LinkedIn.

We used to do other places, whether it was Monster.com, Craigslist or something else.

Strauss: It’s gone.

Dunlap: It’s gone.

Harrison: It’s all about LinkedIn because not only can you target what you want, but you can then go look and find out about candidates, which can be really helpful.

Dunlap: Exactly. That’s the key. We can access talent in a way we couldn’t access it before.

Clobery: Tell me how you’re accessing talent by LinkedIn.

Dunlap: We’re searching constantly. It has a great search engine. You can say I want someone who has worked at these types of organizations, with this kind of title, with this kind of skill. It is a good way to identify people we’re not aware of already. It’s a key sourcing tactic now and gives us a way to identify people much more quickly. But, sourcing is only one piece. Vetting and evaluating require individual analysis and personal recommendations.

A cold prospect in a search is the scariest thing you can have because unless you can find way to vet them, you don’t know.
A Guide To Nonprofit Education

Nonprofit management and fundraising has become professionalized to the point that more than 275 colleges and universities offer programs from attendance certificates to a doctorate degree. Many of the courses are available online. Below is a list of many of the schools that offer programs.

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