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How to Identify, Hire and Retain the Perfect Planned Giving Officer

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Whether you're starting a planned giving program, replacing a headcount, or expanding your staff, finding the "perfect" planned giving officer is always a challenge. This session is designed to walk you through the process of a successful search from preparing to enter the candidate market, profiling your dream prospect, building the candidate pool, interviewing top applicants, hiring the new officer, and managing the new hire.

Every job search is different because every nonprofit is different and every planned giving position is unique. Consider the stories of three charities entering the job search market.

- ✓ Charity A, a large university entering the quiet phase of a $1 billion campaign, just received notice their planned giving officer of five years was leaving. The Vice President for Development felt panicked. Planned gifts were to be a major part of the upcoming campaign. In fact, the planned giving team was responsible for raising 30% of the campaign goal. What could have gone wrong? Now they need to quickly fill the position.

- ✓ Charity B, a small social services organization, recently celebrated 40 years of operation. The organization relies primarily on the $2 million it raises each year in direct mail for operating funds. The charity has never had a development officer – the Executive Director has always handled the direct mail appeals himself using a database developed by a board member to drive the process. Now they want a development officer who can do it all, from annual appeal to planned giving.

- ✓ Charity C, a medium-size Church with a $50 million endowment created largely with a single bequest, has never had a professional development staff, relying on Church volunteers for its annual stewardship campaign. Through a strategic planning process, the Church identified the opportunity to expand the Church's outreach in the community and the opportunity to raise significant additional operating and endowed funds by hiring professional staff. They'd like to hire a development officer in the Foundation that can support the Church's stewardship efforts and begin to have conversations with congregants about planned gifts.

Clearly the job scope and expectations of each of these jobs is different. However, the principals and process to fill those jobs is the same.

I. An Overview of the Issues

A. The Role of the Planned Giving Officer

The role of the planned giving officer can vary from an entry-level job answering inquiries about bequests to a sophisticated planning role coaching attorneys, accountants, and financial planners through complex transactions. The planned giving officer may be one of a staff of three development officers for a small charity or part of a three-member planned giving team supporting a thirty-member university staff scattered across the country. The first step in a successful planned giving search process is to clearly define the role of the planned giving officer.

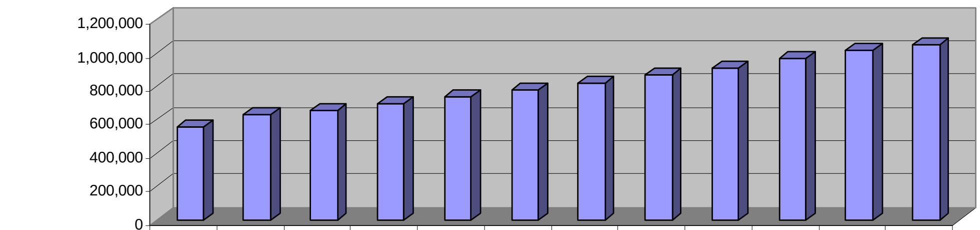
B. The Scarcity of Experienced Planned Giving Officers

One of the biggest hurdles when searching for the "perfect" planned giving officer is the scarcity of experienced candidates. This scarcity is the result of the relative newness and specialty of the field, and the great demand for the limited number of officers who are out there.

1. The Growth in Planned Giving Programs

The statistics and anecdotal phone calls I receive indicate the number of charities with planned giving programs is growing. One reason is the number of charities is growing. The number of charities on the IRS master file has increased by 77.66% over the last ten years from 588,745 in1994 to 1,045,979 in 2005 (see Table 1).[1]

TABLE 1
NUMBER OF REGISTERED 501(C)(3) CHARITIES IN THE US 1994-2005



	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Number of Entities	558,745	626,226	654,186	692,524	733,790	773,934	819,000	865,096	909,574	964,418	1,010,365	1,045,979

As the development programs at these charities mature to include planned giving, there are also well established charities initiating planned giving programs to diversify fundraising revenue. It seems that almost all charities have heightened interest in planned giving and endowment because of pressures that include:

- ✓ The increased competition for dollars due to the increase in the number of charitable entities;
- ✓ The world wide disasters – 9-11, the tsunami, earthquakes, and hurricanes – that have absorbed donor dollars;
- ✓ The dramatic cuts in government grants due to drops in tax revenues from 2001-2003;
- ✓ The downturn in private foundation grants as asset values dropped and grant awards followed; and
- ✓ The increased interest in building endowment and permanent resources.

2. Holding On To a Planned Giving Officer

Once you've found the "perfect" PGO, your next challenge is to hang on to him (or her) because the increasing demand means your officer will likely be recruited for other positions. The National Committee on Planned Giving conducts periodic surveys of its membership to assess experience, turnover, salary, and job satisfaction. These surveys, conducted in 1992, 1994, 1998 and 2002, provide the only reliable data about planned giving officers in the field.[2] In the Gift Planner Profile 4 (2002), 51% of the respondents indicated they had changed positions in the last three years, 66% moving to a new organization, and 34% taking a new position in the same organization. The top two reasons cited for the transition were an interest in changing job responsibilities and the opportunity to earn more money.[3]

[1] United States Internal Revenue Service Publication 78, available at www.irs.org.
[2] NCPG's *Gift Planner Profile, Gift Planner Profile 2, Gift Planner Profile 3,* and *Gift Planner Profile 4.* The author has searched without success for other statistics and would welcome contact from anyone with other reliable data on the topic.
[3] Johnson, Tanya Howe, "Seeking and Searching in the Gift Planning Marketplace," Journal of Gift Planning , National Committee on Planned Giving (Third Quarter 2003), p. 20.

C. The Reality Factor: Gift Planning is a Low Priority

There is at least one other reason it is difficult to hire and hold top planned giving officers. The board and staff of many charities do not understand the role of the planned giving officer, do not understand the value of gift planning in cultivating and building relationships with key donors, and do not prioritize gift planning in the charity's development program. These attitudes are then reflected in the planned giving program budget, resources available for marketing, fundraising goals, and counting and reporting policies. As one beleaguered Director of Planned Giving explained to me: "PGOs are hired with enthusiasm, the promise of volunteer, staff, and budget support, and choruses of excitement about endowment; within the year those promises are forgotten as the realities of the difficulty of meeting annual fundraising goals take precedence."

II. The Things You Must Do Before Going to the Market

The most critical work in the job search occurs before the search team makes the first phone call to identify prospects. It is critical to understand, define, and reduce to writing the job responsibilities and key characteristics of the person who will fill the job before you begin to look for candidates.

A. Define the Job Responsibilities

The first thing an experienced planned giving candidate will ask in the job search process is: "May I see a job description?" The job description is the primary tool used to define the role of the planned giving officer and analyze the skill sets needed to accomplish the job goals. The responsibilities depend upon a number of factors described below.[4]

1. Part Time or Full Time

Few charities hire planned giving officers that devote 100% of their time to planned giving; most share other development or marketing responsibilities. In NCPG's *Gift Planner 4* survey, only 17% of 1,680 respondents (comprised of 89% nonprofit and 11% for profit employees) reported they worked full time in planned giving. The largest percentage of respondents – 39% – reported they spent only 1 to 24% on planned giving responsibilities. Survey responses are shown in Table 2.

TABLE 2
PERCENTAGE OF TIME DEVOTED TO PLANNED GIVING
NCPG'S *GIFT PLANNER 4*

Percentage of Time Devoted to Planned Giving	*Number of Respondents*	*Percentage of Respondents*
0%	29	2%
1 to 24%	664	39%
25 to 49%	266	16%
50 to 74%	201	12%
75 to 99%	251	15%
100%	290	17%
Total	1701	100%

Therefore, the first step is to decide how the new hire's time will be allocated. The job description should clearly delineate expectations and other responsibilities.

2. The Stage of Your Program

The next thing to consider is the age of the charity's development and planned giving program.

[4] Three sample job descriptions are provided at Appendices A and B.

- ✓ *Start up gift planning program*. Are you hiring someone to start a planned giving program? You may need someone with a strong entrepreneurial spirit who can chart the course, take charge, and proceed with little direction.

- ✓ *Basic bequest program*. Are you hiring someone to introduce major and planned gifts as part of a relatively new or small development program? In this case, the key employee trait you may need someone with experience in building donor relationships. Or, if the program is strictly focused on bequests, you may be looking for someone with previous experience in marketing bequests and follow-up.

- ✓ *Established program with sophisticated gift planning*. Do you want to hire an "expert" to serve as a resource for the organization's major gift officers to close complicated gifts? This position requires someone with experience in gift planning, working with donors, and coaching/working with other development staff members.

The stage and goals of the program dictate the skill sets and experience level needed in the new hire. Be honest about the focus of the program.

3. Job Duties

Once the general duties – and time allocated to each function – are set, make a list of the job duties. The planned giving duties may include one or more of the following:[5]

- ✓ Design and implement a planned giving program.
- ✓ Support planned gift options in capital campaign.
- ✓ Set goals for planned gifts and regularly report progress to goal.
- ✓ Identify, cultivate, and solicit potential planned gift donors.
- ✓ Make 100 to 120 calls (or more) on donors annually to solicit a major, campaign, or planned gift..
- ✓ Create pipeline of planned gift prospects.
- ✓ Prepare call reports following visits or other contacts with donors.
- ✓ Create a planned giving marketing plan to cultivate and steward ongoing donors and planned giving prospects.
- ✓ Create and maintain a planned giving recognition society for donors.
- ✓ Create an appropriate stewardship plan to maintain ongoing relationships with donors who have made planned giving commitments.
- ✓ Develop appropriate marketing materials to support contact, marketing, and calls with potential planned gift donors.
- ✓ Develop appropriate planned giving marketing outreach through the charity's website.
- ✓ Develop (and update annually) the organization's gift acceptance, stewardship, and counting/reporting policies.
- ✓ Join and attend professional groups and educational sessions as needed; keep abreast of current trends.
- ✓ All other duties deemed necessary as requested by the President & CEO..

4. The Staff Dynamics

Closely related to the stage of the charity's planned giving program are the staff dynamics. These dynamics are largely driven by the charity's development culture and experience with previous gift planning officers. In many charities, the development functions are siloed. Major gift officers have assigned donors and planned giving officers yet another group of assigned prospects. This is a very different culture than the increasing number of development shops with integrated functions where all

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[5] If the position has annual fund, major gift, or marketing/public relations responsibilities, these duties must be listed separately.

major gift officers serve a PGO role or the hub and spoke model where a central planned giving office supports a field of major gift officers, joining the gift planning discussion upon invitation. The job description and job announcement should clearly define the role of the planned giving officer in your organization.

5. Reporting Responsibilities

The second item job seekers most commonly request is an organizational chart that clearly defines the structure and reporting responsibilities within the development office and within the organization. Organizational charts speak volumes about the priority of planned giving and its voice inside the organization by showing the layers between the PGO and the top development position. If the organization does not have an organizational chart that can be easily e-mailed, create one and have it available for those who inquire.

B. Defining Perfection

Once these key decisions are made, it is then time to define the characteristics of the "perfect" candidate. As you define the candidate profile, mark those characteristics on the list that are "essential" so that you will not confuse "the perfect profile" with "essential candidate characteristics." The "perfect" candidate may not be out there, but the candidate with essential skill sets will be. The traits you need for your position are discussed in more detail below.

1. Professional Experience

Professional experience is essential. Keep in mind, however, that the number of truly experienced planned giving officers is limited. NCPG's *Gift Planner Profile 4*, 40% of the respondents had 4 years or less of gift planning experience, as shown in Table 3.

TABLE 3
YEARS OF GIFT PLANNING EXPERIENCE
NCPG'S GIFT PLANNING PROFILE 4

Years of Gift Planning Experience	*Number of Respondents*	*Percentage of Respondents*
0	23	1%
Less than 1	104	6%
1 to 2	230	14%
3 to 4	329	19%
5 to 10	491	29%
More than 10	523	31%
Total	1700	100%

If the charity needs a sophisticated gift planner to assist and close complex gifts, do not skimp on required experience. If the charity needs someone to create a start-up program, less experience may be required. When a charity is looking for someone to build relationships with donors and solicit major gifts and bequests, there is less need for gift planning experience and more need for someone with experience in relationship-based fundraising. Be realistic in your requirements and calibrate the required gift planning experience to the job duties.

2. Technical Expertise in Gift Planning

Technical expertise in gift planning on its own – that is, without experience in applying that knowledge to discuss gifts with donors and move them to closure – is rarely enough to merit hiring a candidate. One of the most common mistakes many charities make is to hire an attorney, a bank officer, an investment professional, or a financial planner who has the technical skills – but not the experience or personality – to solicit donors and close gifts. This is not to say that there are not for-profit professionals who transition well to nonprofit gift planning jobs, but that the harder thing to train a candidate to do is to call on donors, build relationships, and close gifts.

3. Knowledge of the Institution

Knowledge of the institution is always important and anyone who comes to the job interview with personal experience, previous contact, or other first hand information has obvious appeal. However, this is information that can easily be taught and that any good planned giving officer can build quickly with the support of the institution's staff. The bottom line is that this gives the applicant an advantage, but this characteristic alone should not be pivotal to the hire.

4. Familiarity with the Community

Possessing familiarity with the community is similar to possessing familiarity with the institution. Many charities wrongly believe the key quality for a planned giving officer is knowledge of the community. They gravitate to individuals who are part of the community's upper social milieu or who are life long members of the community. In truth, it may be very difficult for these individuals who grew up with the organization's key donors to discuss money, finances, and personal charitable intent with these friends. The more important candidate skills are donor relationship-building, development experience, and programmatic focus. An experienced and qualified planned giving officer will meet and get to know the charity's long-term donors as they are introduced by the charity's top executive, the major gift officers, or board members or simply make those contacts on their own.

5. Other Skills or Attributes

Other factors that are considered important in hiring a planned giving officer are set out below. As mentioned earlier, always take care to distinguish between skills that are "essential" (minimum/threshold qualifications) and those that are "desirable" (advantages but not essential). These may include:

- ✓ *Education:* Generally, a college degree is a minimum; advanced degrees are generally desirable. Do not make the mistake of requiring a JD degree – there are many skilled gift planners without this degree.

- ✓ *Managerial Experience:* This requirement should be set by the employer and will depend on the individual's role in the organization. If they are responsible for managing a team, some managerial experience is recommended.

- ✓ *Certifications or Special Skill Sets:* There is no planned giving certification, so most charities seeking PGOs make fundraising certification a desirable, but not essential, qualification. However, be sure to list skill sets that include a proven track record of success in relationship-based fund development, strong telephone skills, personal social skills, the ability to write well and express thoughts clearly, the ability to work with a team, and similar skills.

- ✓ *Knowledge of the Charity's Data Management Software*: A candidate should be familiar with one or more data software systems which in turn would make them familiar with cataloging and using that data to drive calls and follow-through. It is not critical that the candidate be familiar with the specific system used by the charity.

C. Detailing Production Expectations

The place where the candidate may fail – and the charity will be disappointed – is in the ability to make donor calls, manage projects, steward donors, produce commitments, and close gifts. Therefore, it is important to articulate the production expectations prior to going into the search. Any good candidate will inquire about those expectations early in the interview process. If the charity does not have clearly established goals, this will send a negative signal to applicants. Expectations should include dollar goals, calling goals, event responsibilities, and other line of development goals (such as major gifts, marketing, etc.).

D. Getting the Support of Management

At the same time you set expectations for the candidate, it is important to set the internal expectations for support of the position, especially if the position is new. This step is particularly important if there has been significant turnover in the position, implying the current support model needs change. Determine the types of support required and use the interview preparation stage to get buy in. Examples of the type of support you may require include ensuring a planned giving seat at the table in the weekly development management meeting, access to personal training opportunities, opportunities to train other development and executive staff, or face time with the board.

E. Creating the Budget

Be prepared to reveal the elements of the budget that will support the position. The budget should be complete, including detail for personnel (including support staff), marketing, postage, website, data analysis, consulting, recognition events, travel, donor meetings, external staff training, internal staff training, volunteers engagement (including professional advisors), seminars for professionals, seminars for donors, and similar costs. A comprehensive budget will be attractive to prospective candidates; a meager budget may be a deterrent.

F. Other Data

Other information you'll need before going to market includes:

- ✓ A brief history of the organization and its development program, with emphasis on planned giving
- ✓ The most recent strategic plan
- ✓ The most recent development/planned giving audit
- ✓ Any other data representing an overview of the opportunities or goals of the job

These documents are not generally distributed to anyone who inquires. Rather, you will need them for serious candidates either because they will request them or you will want to share the information with them to generate feedback and assess their understanding of the information during the interview process. It is important to gather the information in advance and have the internal conversation about which documents are appropriate for distribution and which are not. In some cases, you may only want to share excerpts from key documents.

III. Going to the Market

The key to a successful job search is building a qualified pool of applicants. This is the step that creates the greatest challenge for charities. There are really only two options: conduct the search on your own or hire a search firm. Each has advantages and disadvantages.

A. Going it Alone

1. Advantages

Many organizations choose to conduct the search without the help of an outside firm because: they believe they know their culture and needs better than an outside firm and the cost is high. These are valid points. Conducting the search independently allows the charity to set its own pace, get a good feel for the market, and identify candidates for subsequent needs (or other open positions). An internal search also has the advantage of substantially reducing the search out-of-pocket costs.

2. Disadvantages

There are three real disadvantages to conducting the search on your own.

1) First, it is far more difficult to build a qualified pool of applicants. You may feel uncomfortable making a direct solicitation of other planned giving officers in the community; applicants may not respond directly to the charity for fear of a current employer finding out; or they may simply feel uncomfortable responding to an ad without knowing more about the position.
2) Second, the job search process is extremely time consuming. This is a particularly difficult burden for the manager responsible for the search since he or she is already short one position (the open position.)
3) Third, the charity has a lost donor opportunity on every day the position is open. Filling the position quickly – and with the right person – generates donor dollars more quickly.

3. Getting the Word Out – Posting the Open Position

If the goal is to build a deep qualified pool of applicants, the challenge is making contact with prospective candidates in a way that will entice them to step forward. There are a number of options:

- ✓ Place ads in national publications such as the *Chronicle of Philanthropy*, *Chronicle of Higher Education*, the *Nonprofit Times*, and similar print media. These ads have costs associated with them but generally offer an online job posting as part of the package.
- ✓ Place ads in local planned giving/AFP or other development-oriented membership newsletters/online sites. These ads may have a nominal fee or may be free to members. In some cases, the organizations are willing to send a blast e-mail to members to announce the job opening as a service to its members.
- ✓ Post the job with the local Nonprofit Resource Center. Most states have Nonprofit Resource Centers, which are membership organizations. These job postings generally have a nominal cost and are available only to members.
- ✓ Make the announcement on List-serves for the profession. GIFT-PL, a list-serve for members of the National Committee on Planned Giving, generally tolerates a one time job announcement posting.
- ✓ Post the job on bulletin boards at national, regional, or local conferences. It is always possible to physically post the position on a job board provided by many conferences.
- ✓ Advertise in local newspapers. This is a long shot for a specialized position such as a planned giving position but can work. (Just be prepared to get many resumes from individuals who have never done development, don't know what the term "planned giving" means, but are confident they are the candidate you're looking for.)
- ✓ Post the position on the job pool page on a state-media website. Although a long shot, many candidates will consult the job listings on the state website. In this mobile society, potential candidates are moving back home to take care of parents, for medical reasons, or even for a spouse's job.[6] (Again be prepared for many applications that don't come close.)
- ✓ Post the job on some of the online job sites such as www.Monster.com, www.idealist.org, www.nonprofitjobs.com, or www.philanthropy.com/jobs/.
- ✓ Post the position anywhere else you believe prospective candidates might see the posting.

4. Making Proactive Contacts

Simply placing ads for the position will not build a deep pool of candidates. It is best to build a proactive element into the mix to increase the list of qualified candidates. Use membership lists of local

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[6] In Alabama, for example, al.com is the state's media/advertising website. Newspapers from around the state offer access to job openings posted in the want ads, or those posted through al.com.

planned giving councils, AFP[7] members, AHP[8], CASE[9], or similar organizations to identify prospects for the position. Then, contact them by mail, telephone, or e-mail to describe the opening and ask if they have an interest, or if they can identify anyone who has an interest. This is slow, tedious work but can have extremely beneficial results. The old adage in job search is true: the best candidates will be those doing well in their current positions who are not actively seeking a new job.

5. Networking

Pick up the phone (or head to the keyboard) to let everyone you know in a position of influence/knowledge in the development and planned giving community the job is open. Share the job description and provide the charity's contact information. Old fashioned networking is a powerful – and sometimes the most effective – job search tool. Make the networking contact as personal as possible (as opposed to a blast e-mail or form letters) for best results.

B. Using a Search Firm

The alternative to a self-conducted search is to use a professional search firm. The search firm's responsibility is to build the pool, screen the candidates, and present the charity with a field of 3-5 qualified candidates for interviews.

1. Advantages

While hiring an outside firm does not relieve the charity of all responsibilities in search, it does shift the most challenging and time consuming aspects of the work to an outside party. There are four primary advantages to using a professional search firm.

1) First, the first is extremely knowledgeable in identifying candidates. The firms have networks of contacts and in some cases, banks of potential candidates. They know the field and how to identify candidates.
2) Second, a professional firm is experienced in screening candidates, making it less likely the charity will hire a candidate that is later discovered to have a difficult or spotty past, or has a personality that does not fit with the development team or organization's culture. This expertise is developed from years in the business. A good firm will take the time to get to know your organization's culture and needs, and then find a candidate that matches the profile you're specified. Firms will also take the time to review the job description, discuss salary bands, educate key staff members on the challenges, and review expectations, giving you important feedback.
3) Third, the huge time commitment required to locate and identify potential candidates is shifted to an outside party, leaving the charity's management team and staff to continue with its important development work.
4) Fourth, the firm can negotiate the engagement of the successful candidate which may be difficult for charities without experience.

2. Disadvantages

There are also disadvantages to using a recruitment firm.

1) The cost is high. Recruiting firm fees are generally 1/3 of the first year's salary and benefits as well as out of pocket costs. Some firms have minimum search fees that make it difficult to use an outside firm for lower level positions.

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[7] Association of Fundraising Professionals.
[8] Association for Healthcare Philanthropy.
[9] Council for Advancement and Support of Education.

2) The search process may be frustrating for the charity due to lack of transparency. Most search firms do not share candidate names they've talked with (because of confidentiality for proprietary reasons) so that it is difficult to get a feel for how well the search is progressing.
3) The charity is generally prohibited by contract from hiring candidates that are interviewed but not hired for up to a year after the search, unless the charity is willing to pay the full search fee to hire the candidate. In other words, the candidates become proprietary to the search firm once they are presented to the charity as candidates.

3. Details of the Contract

Always use a written contract when engaging a professional search firm. That contract should detail the estimated timeline, the costs (how those costs will be determined and when they will be paid,[10] including any approval provisions for expenses over a specific amount), approvals for expenses, if desired, and a back-up plan (to conduct another search at no cost) if the candidate fails to stay a specific period of time such as six months or a year.

4. Time Table

When you interview potential search firms, ask them to provide the standard timetable for the search. While there are many factors beyond a firm's control and none will guarantee they can produce a candidate by a short time line, all will have a feel for the time required for a normal search. For example:

2 weeks	Clarify job responsibilities and develop job description
2 weeks	Post job in print and media locations
6 weeks	Identify and interview candidates – at the end of this period, present 3-5 candidates for interviews

Once the candidates are presented to the charity, the charity – rather than the search firm – controls the timetable. The charity may be able to bring all candidates in for interviews over a 3 week period or may need up to 6 weeks to coordinate these visits. If the charity has a two-tier interview process, this timeline can be extended further. It is important to be realistic about how difficult it is to coordinate schedules and move through the process. It is also important to get the top candidates onto your organization's campus and in the loop as quickly as possible. Good candidates will lose interest or accept jobs with other organizations if kept dangling too long.

5. Finding the Right Firm

The real challenge in using a professional firm for the search is finding a firm with consultants who understand planned giving. The best firms will spend time with the charity's staff before the search to get a feel for its culture, the working arrangement of its staff, and the demands of the position. If a firm has never hired a planned giving position before, however, it is difficult to fully translate the demands and nature of the job. If the firm does not understand the position and its demands, it is unlikely they will be able to deliver qualified candidates. Always ask about the experience of the individual responsible for the search, and talk to other charities that have used the firm to find planned giving positions.

IV. The Interview Process

Whether or not you use a firm to identify top candidates, you will still need to interview and assess those prospects. Any one who has responsibility for managing employees has interview experience and likely uses a specific methodology to assess job candidates. For those who have never interviewed job candidates, the process can be daunting. The methodology suggested in this section is just one option.

Interviewing is always an interesting dance of screening the candidate and selling the organization. They key is to learn as much as possible about the candidate's background, personality, and ability to meet

[10] It is customary to pay a percentage of the estimated fee – up to 1/3 – in advance.

the demands of the specific job. It is also the time to introduce the candidate to other members of the team and describe the position you need to fill. This is no time to be coy about the job responsibilities, or shy about detailing management expectations. A candidate who is scared off because of the job requirements is obviously not a great prospect.

A. Initial Review of Resume

Get the prospective candidate to send you a current resume early in the interview process. (I generally will not schedule a telephone or first interview without the resume in hand.) The resume is only part of the story, but the details therein offer the first opportunity to assess whether the candidate meets the minimum requirements, such as educational background, management experience, and gift planning experience. The resume is also the candidate's first opportunity to present himself to you and speaks volumes about his qualifications, professionalism, and potential.

1. What to Look For on the Resume

Here's what to look for on the resume:

- ✓ Current position
- ✓ Years in development, in relationship-based development (major gifts/planned giving) and planned giving specifically
- ✓ Average number of years in each job
- ✓ Logical, upward progression in jobs (not essential, but certainly you don't want to see a downward trend)
- ✓ Educational background
- ✓ Certifications, training
- ✓ How the candidate presents himself/herself
- ✓ Volunteer roles
- ✓ Minimum job requirements

Candidates that clearly do not have the requisite experience should be notified they do not fit the minimum requirements. Those that do not appear to fit squarely in the requirements, but have experience that may overcome the minimums, or in other ways fit the job needs should probably be included in the first round of telephone or personal interviews.

2. Resume Red Flags and Fireworks

You will intuitively key to problems on the resume, but if you are worried about your instincts, here is my checklist.

- ✓ Lack of any fundraising experience (many attorneys, accountants, financial planners apply for planned giving jobs but have no previous fundraising experience)
- ✓ Job hopping – frequent turnover staying two years or less in each job repeatedly (I would not be concerned to see one short-term stay if the candidate has had reasonable tenures in other positions and has a good explanation)
- ✓ Gaps in work history (that do not have a logical explanation)
- ✓ No dates at all on education and work history (I always ask, but still sometimes get fuzzy data)
- ✓ A resume that touts skills or interests in another field (indicating the candidate is applying for any open position)
- ✓ A cover letter that has not been customized for your job opening (worse yet, has another company's name in the body of the letter)
- ✓ Poor grammar or typos
- ✓ Anything on the resume that looks inappropriate or out of place

B. The Telephone Interview

A telephone interview is an easy way to get a good feel for the candidate and his philosophy and goals. It is especially valuable when the candidates are not within easy travel distance. I generally schedule 30 to 45 minutes for the first telephone interview. The purpose of this call is to qualify those who appear to qualify on paper, to make an assessment of those who might qualify but fall just a bit short of required years of service, and to make an initial assessment of communications skills and job attitudes.

1. The Course of the Conversation

I recommend you begin by asking the candidate to relate his work history, beginning with either the first job out of college, or the initial entry into the nonprofit field (depending on the candidate's age/work history). Ask the candidate to focus on what attracted them to each job, whether it met their expectations, and what they found most valuable about the position, and what caused them to leave for the next position. This is a very open ended question and a great way to get a feel for communication skills and clarity of thought. It also reveals much about their working relationship with and attitudes about prior employers.

Next, ask the candidate to list the top three things they are looking for when they move to their next job. If necessary, you can follow that by asking the candidate to describe the top three things that would drive them away from a prospective job.

Finally, ask them what attracted them to your charity or the position. Something sparked the candidate's interest and prompted them to send you a resume and spend the time on the telephone.

The telephone interview is also the first opportunity you have to sell the organization and the position. Do not underestimate the importance of this step. There's nothing more frustrating than getting a glimmer of the perfect candidate only to have them lose interest.

2. What You're Listening For

Here's what to look for as the candidate speaks:

1) The story. It's always interesting to listen for the passion, interest, and career focus. There should be a logical progression of opportunity and experience that leads the candidate from job to job.
2) Communication skills. How well does the candidate relay the story? Listen for clarity, succinctness, and ability to stay on point and follow instructions.
3) Tone. Was the candidate always a victim of office politics? Was the candidate always too good (smarter, more strategic, etc.) than co-workers? Was the candidate constantly misunderstood? Was the description of each job more negative or positive?
4) Sensitivity/listening propensity. The candidate should stay connected to you, stopping occasionally to check to make sure they are relaying the information at the level of detail your requested. Sometimes when I ask a candidate to relay a job history, she will talk for 30 or 40 minutes, ignoring or running over the occasional questions I ask for clarification.
5) Preparedness. Did they do their homework before the interview? The candidate should have researched the basics about your charity and the job. If a candidate has not bothered to prepare at all, this may translate into her approach on the job.
6) Questions. It is always interesting to see what the candidate requests during the interview. I would expect serious candidates to cut to the chase on job expectations, reporting structure, and job description indicating seriousness, interest, and focus.

If candidates are scattered across the country making it expensive and time consuming to bring the candidates on site for an interview, you may decide to conduct a second round of telephone interviews with the top candidates. If, for example, you have 50 respondents and select 20 for telephone interviews, you may want to reduce this to the top 10 to 12 candidates and schedule a second interview. If the candidates are in the community, you will get more from this stage by scheduling an on site interview.

C. The On Site Interview

The on site interview is a critical process in which you get a direct reading on the candidate, and the candidate gets a direct reading on your staff and organization.

1. Buying and Selling

The first interview is as much selling the candidate and it is questioning and analyzing the candidate. This is the stage in the interview process that becomes very time consuming, involving not only your time as the lead interviewer, but also many other important people in your organization. It's best to be as frank as possible about the challenges, and let them meet and get to know many of the key players at the same time you focus on the strengths and opportunities of your charity and planned giving program.

2. Who Should Participate in Interviews?

In the first interview, you may want to keep the audience limited to the key players on the planned giving/major gift/development team, holding interviews with the CEO, CFO, program staff and other key players until the second interview. Let them talk to potential co-workers so the candidate can evaluate the charity's culture and staff working relationships and other members of the team can assess the candidate's fit in the organization.

3. Time and Place

Schedule the interviews in the charity's office. If you want to conduct interviews in secret, it will telegraph to candidates that you do not manage your team in an open and forthright manner. If the candidate requests a meeting off campus, you will need to judge this request by the circumstances. It may be reasonable for a candidate with a high profile job with a competing charity to request an initial private meeting to find out more about the job, and it is always possible to provide confidentiality for the interview process. But there is no way to properly assess a candidate's fit with your organization without letting him talk directly with you or those who will be co-workers.

4. Who Pays What

The candidate must take personal, vacation time to visit with your organization. It is only reasonable that the charity cover the costs of the candidate's travel, lodging, and meals for the process. This is simply one of the hard costs of filling a job. It is not common (or appropriate) to pay the candidate for his or her time.

D. The Second Interview

The direction of the second interview will depend on the issues that arise in the first interview. You may want to focus on the candidate's perceived weaknesses. You may want to follow up on brainstorming that occurred in the first interview. You may ask the candidate to identify the key issues or top hurdles he sees in the new job. Conversely, always ask about the greatest untapped possibilities he sees. Ask about trends the candidate sees in the field and get him to identify how those trends might affect your charity. Ask about best practices at the best charities he has worked with. Make sure the candidate gets to talk with the organization's key players in this round to include the CEO, CFO, current and former board chairs, development chair, and any other members of the staff or volunteer executive leadership group.[11]

[11] Be clear with volunteers about their role. The primary role of the interviews with the board or volunteer leadership is

E. Building Consensus

A planned giving officer – more than almost any other development officer – must work as part of a team. Leads for prospects will come from the annual give office, the major gift officers, and maybe even the program staff. Therefore, make the hiring decision a joint one.

1. Input Following Interviews

Prior to schedule an interview between the candidate and the staff member or volunteer, give them an interview worksheet. Tell them what to look for. If necessary, give them some questions to ask. Always give them an evaluation form in advance so they will understand exactly what they will be asked to report after the interview. Then, follow through to get the interview form within 24 hours of the interview time. If you do not act quickly to gather comments memories will fade. The feedback process is a great way to get key impressions, build consensus among co-workers, and allow the team to take ownership of the candidate. (Be sure not to send the message that any one individual has veto-power – ultimately, the hiring decision must be yours.) The best way to avoid any problems is simply to be clear about the role co-workers play in the hiring process. And do not overlook the fact that co-workers are some of your best – or worst – salesmen for the candidate.

2. Listening

Listen to the praise, comments, and concerns expressed by those who interviewed the candidate. The interview process is long and stressful – not every candidate is going to be at peak performance for the full interview period. One bad interview may be as much a product of the interviewer as the interviewee. When you get negative feedback, probe for the details so that you can assign the appropriate weight and significance to what you hear.

3. Calling References

I generally recommend you wait to call references when you have narrowed the field to the top one or two candidates. Always let the candidate know you intend to contact references. There are a couple of reasons for this. First, calling references is the surest way to let the world know the candidate is job hunting. This could have some extremely negative consequences for the candidate. Let the reference know you are taking a serious look at the candidate and encourage frankness. If you have specific concerns about the candidate, raise that issue and ask the question in a way so that you can ask the reference how the candidate handled specific situations. The more focused your questions, the higher the quality of the feedback.

4. Calling Colleagues

References are individuals selected by the candidate, supposedly because those individuals stand ready to give a positive report. If you'd like to know more about the candidate from other perhaps more independent sources, contact colleagues who may know the candidate. When contacting colleagues, make sure they understand the confidential nature of the inquiry so that you do not unwittingly broadcast the candidate's potential departure from an excellent job.

V. Making the Offer

The offer is a critical step in the process and is the place that you can veer dramatically off track if not prepared or not professional.

A. The Meeting of the Minds

1. Reduce Everything to Writing

While the details of the job offer should not be a surprise – you will have discuss salary ranges and benefits in at least the second interview – it is always important to reduce the job offer to writing. Without a written document, there is too much room for misunderstanding, fading memories, or unfounded expectations.

2. What Should Be Covered

The job offer should include:

- ✓ Salary, including salary range, the frequency of review, and any other representations or promises made in the interview process.
- ✓ Benefits, including health insurance, perks (car, cell phone, etc.), vacation time, sick leave, and retirement.
- ✓ Start date – you should always ask about the notice the candidate plans to give his current employer and the start date at your organization. Then, reduce that to writing.
- ✓ Moving expenses – if you are recruiting outside of your immediate geographic area, it is customary to cover some portion of the moving expense. Otherwise, it may be very difficult for the candidate to make the move. This can be in the form of a lump sum ($5,000), actual expenses up to a specific dollar amount, or an agreement to cover all expenses of the moving including the packing, transit, temporary housing, costs of visiting to find a home, pet transit, piano transit, and an endless list of costs. I recommend actual expenses up to a specific dollar amount. Most charities cannot afford an unlimited checkbook. If your charity routinely recruits from the outside, there will likely be established policies. If this is the first outside hire, contact other similar charities to determine their policies and then create your own (with the approval of the CFO and CEO).
- ✓ Office support and other internal details such as the candidate's role on the development staff executive team, or similar negotiating points
- ✓ Consulting on the side – some candidates want to negotiate a certain number of days a year they can use for consulting as a way of supplementing income and keeping themselves fresh in the field. If this is negotiated, make sure you include the parameters, such as whether those charities can be in the immediate geographic area or in the same field.
- ✓ Working at home – some candidates prefer to work at home one or more days a week. This may or may not work in your charity's environment, especially with a planned giving role. If it was discussed and promised, however, it should be reduced to writing.

It is not necessary to reduce every aspect of the job to writing – but it is certainly important to include all aspects of the job of personal interest or benefit to the candidate. After all, the offer should be designed to be as compelling as possible.

D. Getting Off on the Right Foot

As mentioned earlier, the new employee's start date should be negotiated upon acceptance and reduced to writing. The candidate will want enough time to wind up the prior position in a way that's appropriate (those who are ready to leave with one week or no notice at all may treat your organization in the same manner). In addition, you will need to get to work right away to prepare for the candidate's arrival.

You've invested an enormous amount of time in finding this person. Now take to time to integrate them effectively in your organization. Make them feel welcome, important, and a key member of the team. There is a lot to do to prepare for a new employee:

- ✓ Notify staff about the new employee, giving everyone a summary of the candidate's background and skills. This should be an inspiring review of the new employee that generates excitement among the staff.
- ✓ Make sure you notify personnel of the new employee's arrival and provide a copy of the letter sent to the employee securing the position (this, of course, should have been run through personnel in advance). The personnel department may have a checklist of information or tasks that must be taken care of before the employee's first day such as a drug test, criminal screen, etc. It's best to travel on a "no surprises" platform.
- ✓ Make sure the office is ready with all its equipments. Also make sure the tech department has assigned the new employee an e-mail address and password, the telephone gurus have assigned the new employee a telephone number, and any personalized stationery used by the charity has been ordered.
- ✓ Set up a training program for the new employee. They will need to meet and get to know the staff and staff roles; they'll need to know as much as possible about the charity's history; they'll need to have a deep understanding of the charity's programs and the impact of those programs. Each of these training sessions offers an opportunity to get to know the organization's key players and become a part of the team. It will also take some time to get up to speed, and the more orderly the process is, the more professional and efficient the education curve will be.
- ✓ Arrange for contact with key volunteers. This may be a breakfast, a committee meeting scheduled just for the purpose, or even a reception to welcome the new employee.

VI. Keeping Good Planned Giving Officers

Spending the time and money to find the "perfect" employee only takes you to the starting line. Keeping the employee happy and productive requires time and anticipation of the issues most likely to unseat your new planned giving officer.

A. The Characteristics of a Great Planned Giving Program

In working with many nonprofit clients of varying sizes over the years, I've learned there are some extremely effective planned giving shops and many others that struggle. Here are the characteristics of the most effective planned giving programs:

- ✓ The person to whom the planned giving officer reports has a deep understanding of the role of planned giving and how it impacts and builds loyalty among current donors.
- ✓ Planned giving/endowment building is an integral part of the organization's strategic plan, and a priority in the development office's master plan.
- ✓ Goals are set and measured in a way that encourages the members of the development staff to work as a team rather than placing them in competition with each other, and places value on deferred commitments as well as realized gifts.
- ✓ The members of the development team value each other for the unique skills they bring to the table and work as an effective team.
- ✓ Education is encouraged, both from internal mentoring and external continuing education opportunities.
- ✓ The members of the team get regular feedback on their performance (see more below).
- ✓ The planned giving officer has sufficient internal support to get the job done. This may include administrative support (full time not necessary, but enough to manage the paperwork and reporting so the officer has time to spend with donors), data management (access to information and reports and a place to file information for future use), access to key donors and board members, and use of the website to impart information and encourage donors to make contact.
- ✓ The planned giving officer has a sufficient budget to get out to see and entertain donors, and to have regular print communication with them.
- ✓ Planned gifts are reported with as much fanfare as other institutional gifts.

B. Why People Stay

Even though there is intense competition for planned giving officers, the experienced and much sought after planned giving officers are not willing to leave the job they are in if they feel they are an integral, contributing part of the institution, believe strongly in its mission, and can measure the impact they have on meeting that mission. In fact, it's almost impossible to pull a satisfied planned giving officer away from a charity. (There's too much risk associated in starting over and risking moving to a negative culture.) Here's advice to help you created a committed planned giving officer that will be difficult to attract to other jobs.

1. Set Clear Expectations for the First Year and Thereafter

If you have approached the interview process in an organized and effective manner (using the techniques detailed above), introduced the new planned giving officer and allowed them to get to know the members of the team, clearly defined job responsibilities and priorities, and communicated job performance expectations, managing the employee in the first year should be relatively simple. Setting clear expectations is the single most important factor in getting the best from a new employee. The job description should lay out expectations, and in the first few weeks of work the new employee's manager should sit down with them to set priorities, timelines, resource needs, and performance goals. These goals should be realistic. It will take the employee some time to get to know the charity and its donors and begin making calls. The employee will be far more likely to stretch to meet those goals if they have input and some ownership of the process. It also allows the employee to make requests for support she may need to be most effective, or identify hurdles or obstacles she needs help in addressing.

2. Smooth the Path

Other members of the development team may not be as happy about the arrival of the new planned giving officer as you are. This may be because they perceive the position as more important or a challenge to their own positions. Or, there may be other institutional history that may create problems for the new employee. It is your responsibility as manager to identify those issues and assist in the employee's entry into the workplace. This may involve providing him with the history and background so he is informed, or using the interview process to pave the way and break down some of those barriers.

3. Provide Positive Feedback

Provide the new employee with positive and negative feedback early and often. Never underestimate the power of encouraging, affirming words early in the work process. Every employee – regardless of how obviously skilled or experienced they are – needs this feedback. Too often, managers are delighted with a new hire but fail to communicate that to the employee.

4. Address Tough Issues

It is equally important to address potential problems early. If the employee does not seem to be making an effort to get to know the team, make it clear this is essential and offer to help overcome any hurdles that may exist. If the planned giving officer seems tied to his desk (and is not making donor calls), make it clear that is an element of the annual job performance review. This is obvious advice, but necessary since most people would prefer to avoid confrontation or discussion of negative issues. Raising the issues becomes more difficult as time elapses.

C. Why People Leave

The most common reasons good planned giving officers leave one institution for another is that the charity's development culture does not reflect the "best practices" atmosphere found in effective planned giving operations listed above. Specifically, people leave planned giving jobs for the following reasons:

- ✓ The employee does not get clear direction on job expectations, and little feedback to indicate the things they are doing are meeting those expectations.
- ✓ The employee gets good feedback during the year, but is assailed by job performance problems on the annual review.
- ✓ The charity's management neither understands, priorities, or values planned giving, choosing to recognize planned gifts only when they become irrevocable.
- ✓ The planned giving officer is not allowed to work with the major gift officers or other members of the development team and are instead instructed to select their prospects (and close gifts) from a pool of donors who are not already claimed by a major gift officer, school, or program.
- ✓ The planned giving officer has not administrative support, and is required to file reams of paperwork without support making it difficult to sit down with donors.
- ✓ The planned giving officer watches a meager marketing and calling budget remain stable as the call goals and expectations increase dramatically.
- ✓ There is little or no career path for the planned giving officer inside the organization.
- ✓ Any other actions that diminish the role of the planned giving officer and the impact they can have on the organization.

If your charity has had unusually high turnover – new employees arriving with enthusiasm and leaving within the first two years – take the time to do exit reviews and to analyze the problems. Were the charity and its challenges misrepresented in interviews? Did you promise more support and cooperation than you could deliver? Determine the triggers that caused these employees to exit and address those problems before bringing another employee into the problem situation.

VII. Final Thoughts

In the end, finding, hiring, and retaining the most effective planned giving officer hinges on articulating your organization's needs and using a process that keeps you focused on your goals and the expectations of the new employee. Addressing problems early, helping to integrate the employee into the development team, and providing positive feedback underscoring the employee's impact on the charity's mission cost no money and will create dramatic, positive, results.

For questions about this presentation please contact:

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APPENDIX A
SAMPLE JOB DESCRIPTION
XYZ CHARITY
PLANNED GIVING OFFICER

JOB SUMMARY

XYZ Charity is a national, nonprofit, spiritually based, organization providing local human service programs and opportunities for individual and community involvement. The services address critical community needs such as affordable housing, services for seniors, corrections, substance abuse, children and families, developmental disabilities, mental health, and long-term health care.

The organization, located in Baltimore, Maryland, has 52 affiliate organizations located in 49 states. These affiliates delivered services to 1.5 million individuals in 2005.

The Planned Giving Officer position is new and will be located in Richmond, Virginia. The Planned Giving Officer is responsible for developing, implementing, and coaching planned giving programs in the affiliate offices as well as managing the support and infrastructure for planned giving at the national office.

SUPERVISION

The Planned Giving Officer reports to the Director of Development for Major Gifts.

JOB REQUIREMENTS

Education: BA/BS required. MA, PhD, or JD a plus.

Experience: Candidate must have a minimum of 5 years experience in planned giving, or a minimum of 2 ½ years experience in planned giving and an additional 5 years experience in development. This experience should include a range of fundraising responsibilities that include management or supervision of fundraising processes.

Licenses, Certifications, Registrations: Fundraising certification is a plus.

Special knowledge/skills: Candidate must have familiarity with fundraising recordkeeping and fundraising software. Knowledge of and experience in social welfare and long-term health care are a plus.

Personal traits, skills: Must have excellent communications, problem solving, project management, training, speaking, and motivational skills. Must have initiative and have the ability to set goals and follow through with little direct supervision.

JOB RESPONSIBILITIES

The following responsibilities have been identified as necessary to the process of building planned giving programs in the XYZ Charity affiliate offices. Additional responsibilities related to this role may be added as appropriate.

Key job responsibilities are:

- to serve as the primary contact with affiliate development staff and CEOs to prioritize planned giving and motivate affiliates to participate;

- to monitor progress of planned giving programs nationally and to generate quarterly reports;

- to serve as the planned giving trouble-shooter to answer questions and solve problems for local and affiliate gifts;

- to serve as the traveling gift planner for affiliates that have the ability to generate interest in a planned gift but need help in working through the gift planning process;

- to prepare planned gift proposals using the planned giving software, design cover letters for proposals, and identify options for donors;

- to help affiliates set goals and draft implementation plans;

- to serve as an advisor for programs that are getting started (although use of consultants may be a more effective way to get a program initiated and stabilized; where consultants are used, this staff person could help the affiliate develop an RFP and monitor use of consultant);

- to develop and manage the use and production of marketing materials; to add value to the use of the materials by generating ideas on letters to use with mailings, targeted audiences for mailings, suggestions for estate planning seminars (with sample formats), and methods of contacting professionals;

- to manage the recognition program for planned giving, including ensuring regular contact with planned gift donors, coaching affiliates on recognition, securing permission to use name, printing names in annual report, creating and staging recognition event;

- to maintain contact with donors who have established endowment funds (where appropriate) including annual letter about progress, statements of balances (where appropriate) and comments about value of the use of the funds;

- to manage input of planned giving information in the database and to create a tracking program for Raiser’s Edge and other common database software; and to supervise clerical staff involved in planned giving.

APPENDIX B
JOB DESCRIPTION
FRIENDS OF THE ABC MUSEUM
DIRECTOR OF FUND DEVELOPMENT

FUNCTION

Under the supervision of the Executive Director, the Director of Fund Development (DOFD) coordinates and manages all aspects of fund development for Friends of The ABC Museum (The Friends), including research, initial contact, rapport development, determination of donor interest and compatibility, matching of interests and direct solicitation and procurement of funds (and/or additional funds) from potential (and/or existing) funding sources. These sources include individuals, organizations, foundations, institutions, governmental entities, trusts, estates, companies, corporations and other local, regional, national and international sources. The DOFD is responsible for adherence to all requirements of the US Internal Revenue Service.

This position involves a high degree of interpersonal work of a financially sensitive and confidential nature. At times the DOFD may delegate certain tasks to volunteer and/or paid assistants under his/her direction, but she/he must effectively control the release of confidential information and maintain responsibility for the effective completion of those delegated tasks.

All Friends employees may be called upon to perform other duties not specifically described herein.

CORE PERFORMANCE ELEMENTS

- Works with Membership staff to actively promote, solicit and obtain Friends memberships, membership upgrades, general donations, and to develop, monitor and analyze Friends membership categories, levels and benefits.
- Assumes responsibility for execution of all elements of fundraising, including annual fundraising for operations, major gift fundraising, and planned gift development.
- Develops an annual comprehensive development plan with financial goals for individual donors, corporate donors, and foundation grants, and a carefully articulated plan to achieve those goals. This includes a plan for engaging volunteers to support the solicitation effort.
- Make an annual evaluation of development activities, including special events.
- Assume responsibility for capital campaign efforts, when determined necessary and appropriate from time to time by the Board.
- Makes personal calls on donors to develop donor relationships and funds.
- Actively seeks and obtains underwriting, sponsorship and monetary and in-kind donations for Friends events, activities, garden projects, materials and equipment.
- Work with Executive Director to develop effective methods of recognizing donors and their gifts.
- Develops, manages and maintains a current and comprehensive database for development purposes.
- Researches sources, obtains materials, determines compatibility and files applications for grants and foundation requests.
- Manages certain donor relations and communications using oral and written communication skills, methods and devices, in various business and social settings. This includes developing and maintaining a stewardship program for donors.
- Prepares organizational collateral material and fund raising materials including the annual report, newsletters, website content, promotional pieces, brochures and presentations, using computer techniques and outside assistance as required.
- Reports on donor relations and fundraising progress on a regular basis to the Executive Director, Planned Giving & Endowment Committee and other Friends staff and committees as needed.
- Work with the Executive Director and Chief Financial Officer to establish guidelines for Endowment and build endowed assets through planned gifts and outright contributions.

- Monitor and make recommendations for change to the organization's gift acceptance policies.

WORKS CLOSELY WITH OTHER BBS BOARD AND STAFF AS FOLLOWS

- Advises the Friends President, Board of Directors, Committee and Event Chairs, the Executive Director and other Friends and Botanical Gardens staff on participation in and active support of development efforts, and serves as a general development resource, especially to the volunteer events
- Prepares marketing and development plans and assists the Friends Finance Committee, Executive Director and the Director of Finance with the annual preparation of the Friends budget.
- Coordinates database development with the Membership Manager.
- Organizes, coordinates and runs regular meetings of the Planned Giving & Endowment Committee.
- Directs paid and/or volunteer assistants in the completion of various projects, tasks and assignments.

MINIMUM QUALIFICATIONS

- Bachelor of Arts degree in Business Administration, Public Relations, Public Administration, or equivalent, as determined by The Friends Board, required.
- Five years of nonprofit development experience, or equivalent as determined by The Friends Board, preferred; three years work experience with a not-for-profit organization required.
- Proficiency with MS Excel, and MS Word computer software required. Experience with MS Access, MS Publisher and Raiser's Edge desirable.
- Excellent written and oral communication skills required. Writing samples must be submitted with resume.
- Strong problem solving, training, and personnel management skills. Must have initiative and have the ability to set goals and follow through with little direct supervision.
- Excellent organizational and time management skills required.
- Ability to assess fund-raising needs and opportunities, plan and implement fund raising campaigns, and evaluate their effectiveness.
- Demonstrated ability to work effectively and with highly organized habits and skills both alone and as a team member.
- Confidentiality required. Employment is contingent on the signing of a confidentiality and non-competition agreement.