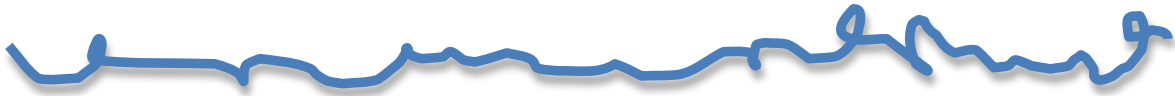


# Finding the right development officer for your organization

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## Part One

Executive directors/CEOs often ask me how to select the right candidate to serve as the chief development officer. Here are some tips:

1. Distinguish between a development officer and an administrative support person. Make sure you have adequate administrative support so that your professional development officer doesn't spend time inputting and manipulating data, scheduling meetings, handling routine administrative tasks. This is a waste of the development officer's time and expertise – and a waste of your money.
2. Craft a darn good job description. Check out the version in my Free Download Library. This is a leadership position with significant design and decision-making responsibilities based. Your chief development officer is a senior level manager, part of the organization's senior team.
3. Obviously, you have to hire someone who possesses the documented body of knowledge in fund development, and demonstrates real-world experience.
4. In addition to expertise and experience in fund development, think about what you expect in any who holds a senior level position. For example: Team player. Effective supervisor, mentor, and coach for other employees (and for volunteers who help raise with fund development). Strategic and critical thinker. Problem identifier and fixer. Leader. (And you must define what you mean by leadership because there are so many different interpretations. Check out my website blog, Simone Uncensored. Visit the “leadership” category.)
5. By the way, I expect chief development officers – and all other senior managers – to be organizational development specialists. That includes familiarity with systems thinking and learning organization business management theories. Knowledge of governance to be able to facilitate that with board members on committees. General management and strategic planning expertise. And so forth.

Those 5 items are just the start...the preparation, so to speak.

Now you, the CEO, have to understand just enough about fundraising to be able to conduct an interview. Start with CFRE International's Test Content Outline. CFRE is the baseline credential for fundraisers. And the Test Content Outline summarizes the minimal knowledges that an experienced fundraiser should have to do the job.

Maybe you'll want to bring in a professional fundraiser to help review resumes, help craft interview questions, and participate in the interviews. I've provided that service over the years.

I suggest the CEO (or his or her representative) conducts a preliminary interview to verify specific information and get a preliminary impression of the candidate. Then the CEO selects the top candidates for interviews. Hopefully, you have identified 3 – 5 candidates for interviews.

Make sure to send you final candidates critical information about your organization. You expect the candidates to come prepared to comment on your materials. For example, I would include the following items:

1. Your organization's most recent annual report, your audit, and your current strategic plan.
2. A couple copies of your donor communications, e.g., a donor newsletter, a solicitation letter, a case for support.
3. Organizational structure, e.g., showing staffing structure and senior management team.
4. List of board members and their general information, e.g., occupation, etc.
5. Some donor statistics, e.g., number of donors, donor retention and acquisition rates.
6. If you have a fundraising plan, definitely include that in the advance information.

### **The interview process**

Construct your interview team carefully. Make sure everyone on the interview team understands his/her role and limitation.

The limitation is the most important, I think. Here goes: The CEO is the one who makes the final hiring decision. Everyone else is there to share observations and offer insights. And the CEO is the final decision-maker.

Here's my favorite interview team:

- 3 – 4 board members including the Fund Development Committee Chair, 1 – 2 members of the Fund Development Committee, and perhaps the board chair.
- Members of the senior management team, e.g., head of program/mission implementation, finance officer, and any member of the senior management team

Of course, the interview questions are critically important. Good interview questions require that a candidate think carefully, respond thoughtfully, demonstrate expertise and experience to you.

Assign different questions to different people on the interview team. Alternate general questions with fundraising-specific questions. Determine the order in which you want to ask the questions. And, of course, other members of the interview team can ask for clarification even if they didn't ask the question originally.

### **One final interview tip**

Pay attention to what the candidates ask you. Their questions demonstrate their insights and expertise and experience. Their questions demonstrate their application of their knowledge and experience based on a review of your information.

### **And one more thought**

I hope you expect job candidates to be assertive and gracious, candid and respectful. I hope you expect the candidate to offer you gentle critique and advice about how to improve your fundraising.

Surely you don't want to hire a meek, mild, dysfunctionally polite, go-along-with-everyone senior manager. Surely you want a leader – and that means courageous, speaks out, challenges assumptions, guide and change agent.

## **Part 2**

So what questions will you ask during interviews? Take a look at the next few pages for some great questions.

Alternate the general questions with the fundraising questions. Assign different questions to different members of the interview team.

### **Questions about fund development**

- 1) Describe for us how you have overcome resistance to fundraising in a previous position from:
  - a. Program staff
  - b. Your boss
  - c. The board
  - d. An individual board member
  - e. The fundraising committee
- 2) What is the process or the thinking that you use to build a development team and a development function?
- 3) Share with us an example of a successful solicitation of yours. Describe the process from the concept and designing of it through what made it successful, and what you learned from the experience.
- 4) Share with us an example of a not so successful solicitation of yours. Describe the process from the concept and designing of it through what made it not so successful, and what you learned from the experience?
- 5) Tell us about your philosophy on relationship building, including the connection as you see it between relationship building and solicitation.
- 6) How will you help this organization identify those who are interested, qualify them as prospects, and then transition them into donors?
- 7) How would you describe (to a donor or prospect) why this organization matters, and what our impact is?

- 8) How have you gained your knowledge of fund development?
- 9) What key principles do you want everyone in the organization to understand about philanthropy and fund development?
- 10) How do you evaluate the effectiveness of fundraising? What measures do you think are most important and why?
- 11) How do you develop yourself professionally? What blogs, authors, and publications do you read and why? What topics do you focus on in your professional development and why?
- 12) What professional association(s) do you belong to and why? How do you participate in these?

**Questions about general management and approach to leadership**

- 13) How do you approach a new job?
- 14) What are the first steps you will take if you are hired for this position?
- 15) How do you define leadership and how do you describe your leadership style?
- 16) Why do you want to work at Children's Friend?
- 17) What skills and applicable strengths do you believe that you bring to the this position at our organization?
- 18) Describe your experience and background and how it prepares you for this position.
- 19) Other than the skills required in the job posting, what skills do you have that you feel could enhance your role in this position?
- 20) What mechanisms or tools do you use to evaluate the effectiveness of key projects?
- 21) Why are you looking to leave your current position? –or- Why did you leave your last position?
- 22) Tell us about a time when you had an overwhelmingly number of things to do?
  - a. How did you prioritize?
  - b. How did you get everything done?
  - c. How would you evaluate your performance?
- 23) Tell us about a time when you had to deal with an irate donor, co-worker, etc
  - a. How did you react?
  - b. How did they react?
  - c. What were the results?
  - d. How would you evaluate your performance?
- 24) Tell us about a time you had to deny someone's request?
  - a. Why did you have to deny the request?
  - b. How did you go about telling him/her no?
  - c. What were the results?
  - d. How would you evaluate your performance?
- 25) Tell us about a time when you didn't have enough information to make a decision.
  - a. What did you do?

- b. What techniques did you use?
  - c. What were the results?
  - d. How would you evaluate your performance?
- 26) What is one of the toughest decisions you've had to make in the last 2 years? And why was it so tough?
- a. Walk us through the steps that led to your decision?
  - b. What were the results of the decision?
  - c. What did you learn and how would you evaluate your performance?
- 27) Tell us about a situation in which you worked with someone else whose background was different from your own. How did that difference affect your working together? How did you handle/respond to that?
- 28) What have you done either professionally or personally to increase your own cultural competence?
- 29) How would you create an atmosphere in which all team members feel valued and respected?
- 30) Tell us about a situation in which others made negative remarks about an individual or group because of their ethnic background, religion, or sexual orientation, and how did you respond?
- 31) What do you anticipate to be your biggest challenge in the first 30 days and how will you handle that challenge?
- 32) You have had a chance to review our strategic and fundraising plans. Please give us your feedback and general comments on what you see and how you would tackle some of the objectives that fall under the responsibility of this position.
- 33) Describe your most ideal and least ideal boss.
- 34) What have you been criticized for in the past two years? Why were you criticized?
- 35) Share with us your concept of leadership. How would you describe the functions of the most effective leaders? What do good leaders do? What skills do good leaders have?
- 36) Tell us about an accomplishment that you are truly proud of.
- a. Why does this mean so much for you?
  - b. What effect has this had on your personal/professional life?
- 37) Share with us a bit of your own philanthropic story.

### **Part 3**

Okey. Dokey.

Interview tips. Team members. Questions to ask about fund development and management and leadership.

But how about the questions you should hope the candidates ask? Because the questions they ask you are as important as their answers to the questions you ask.

Here are some questions that I expect candidates to ask.

**First:** I expect the candidates to request a copy of your most recent audit, your current budget, your strategic plan, and your current fundraising plan. And I expect them to craft questions based on what they find.

**Other questions – in no particular order**

1. What percent of your board members give a financial contribution – to the best of personal ability – every year?
2. Do you have a board-adopted policy that defines the performance expectations applicable to all board members? Do your expectations include giving annually, helping nurture relationships, and helping to carry out fundraising tasks?
3. What kind of metrics (qualitative and quantitative) do you use in fund development? What kind of information do you collect in your fundraising database?
  - a. According to your measures, where are you most effective in fundraising?
  - b. Where are you least effective?
  - c. What are your year-on-year donor retention rates?
4. What does your board talk about – and what actions does your board take – regarding fund development?
5. What are the key messages you reinforce with your board regarding fund development?
6. What do you consider to be your organization’s strengths and opportunities regarding fund development?
7. What do you consider to be your organization’s weaknesses and threats regarding fund development?
8. What strategies and tactics do you use to increase staff and board member comfort in the process of fund development?
9. What roles does your non-development staff play in the process of fund development?

Those are just a few good questions you might expect good candidates to ask. There are more. But it’s time to stop now.

One final note: A special thank you to Children’s Friend, Rhode Island for sharing the leadership and management questions with me, developed by my dear friend Sharon Chancellor.