

STOP THE MERRY-GO-ROUND: Strategies to attract and *keep* development professionals

AHP – Oregon & SW Washington Chapter
Presented by Sarah Panetta
April 8, 2016



S. Z. Panetta & Associates, LLC

AGENDA

- What do I know?
- Why should we care?
- What can we do?
 - Part I: Filling a Position
 - Part II: Setting up for Success
- Questions & Answers



S. Z. Panetta & Associates, LLC

MY SEARCH EXPERIENCE

- 1990-Present: Informational interviews
- 1990-2001: "I like the work, and I really enjoy my colleagues...."
- 1996: MY first re-org
- 2001-2010: 85 staff to 160 staff to 215 staff
- 2010-2013: "What does success look like?"
- 2013-Present: 12 searches in 21 months*

*plus a Master's in Organizational Management + Capstone on Succession Planning



S. Z. Panetta & Associates, LLC

WHY SHOULD WE CARE?



S. Z. Panetta & Associates, LLC

THE COST OF TURNOVER: FUNDRAISERS

From *Donor-Centered Leadership*

- Studies show fundraisers take 18 months–3 years to become effective at a new organization
- When a fundraiser leaves, the organization is set back 18 months-3 years PLUS the time it takes to refill the position



S. Z. Panetta & Associates, LLC

“DEVELOPMENT DIRECTORS CAN WRITE THEIR OWN TICKET IN PORTLAND”

“Don’t bother bringing me candidates with a track record of staying at organizations 18-24 months. I don’t want to talk to them. They’re just going to do that to me.” – *Executive Director*

“Let’s see how long YOU’RE going to last.”
– *Department Chair*

“What IS it about Development people? I’m so tired of being on search committees to replace them.”
– *Board Chair (and generous donor)*



S. Z. Panetta & Associates, LLC

WHAT CAN WE DO?



S. Z. Panetta & Associates, LLC

PART I: FILLING A POSITION



S. Z. Panetta & Associates, LLC

YOUR EMPLOYEE GIVES NOTICE

- Would you like to retain them if you could?
Should you try?
 - **Why** are they leaving?
 - Have they already **accepted** a new role?
 - What are the **bigger picture ramifications** of retaining (or losing) them?



S. Z. Panetta & Associates, LLC

BEFORE YOU POST: To fill, or not to fill?

- Is there an opportunity to re-think how you're using that FTE?
- Why did the previous person leave?
 - Are there issues to resolve before re-filling the position?



S. Z. Panetta & Associates, LLC

BEFORE YOU POST: If you decide to fill...

- Do you want/need someone at the same level as the person who's leaving?
- Is there someone you'd consider promoting from within?
- How has the role evolved since the last time you updated the job description?
- What worked well about the last hire that you'd like to replicate? What would you avoid?



S. Z. Panetta & Associates, LLC

BEFORE INTERVIEWING: Who needs to be invested in the new hire's success?

- External stakeholders (organizational leaders, key donors, board members)
- Direct reports
- Peers
- Opportunities for engagement
 - Provide input before interviews begin
 - Recommend candidates
 - Participate in the Search Committee
 - Include in on-boarding process



S. Z. Panetta & Associates, LLC

BUILDING YOUR POOL

- Professional associations: AFP, AHP, ADRP, APRA, CASE, WVDO....
- Industry-specific: National Association of Independent Schools, National Network to End Domestic Violence....
- Broader networks: CNRG, Mosaic Metier, Mac's List, Craig's List, Idealist....
- Referrals
- Informational Interviews



S. Z. Panetta & Associates, LLC

SCREENING YOUR POOL

- Application Questions
- Interviewing
 - Legalities
 - Behavioral Questions: *"Tell me about a time when you...."*
 - Atmosphere
- Exercises



S. Z. Panetta & Associates, LLC

CHECKING REFERENCES

- Who do you want to hear from?
 - Will this person manage staff? Consider asking for 1-2 direct reports
 - Will this person manage volunteers? Consider asking for a volunteer
 - ALWAYS ask to speak to a former manager
- How can you get 'real' answers?
 - "If you were giving ____ advice, what would you say?"
 - "What advice would you give me if I were to become _____'s manager?"



S. Z. Panetta & Associates, LLC

NEGOTIATING

- How much flexibility do you have?
- Non-monetary benefits
- Start dates



S. Z. Panetta & Associates, LLC

PART II: SETTING UP FOR SUCCESS



S. Z. Panetta & Associates, LLC

WHY DO THEY LEAVE?

From Donor-Centered Leadership

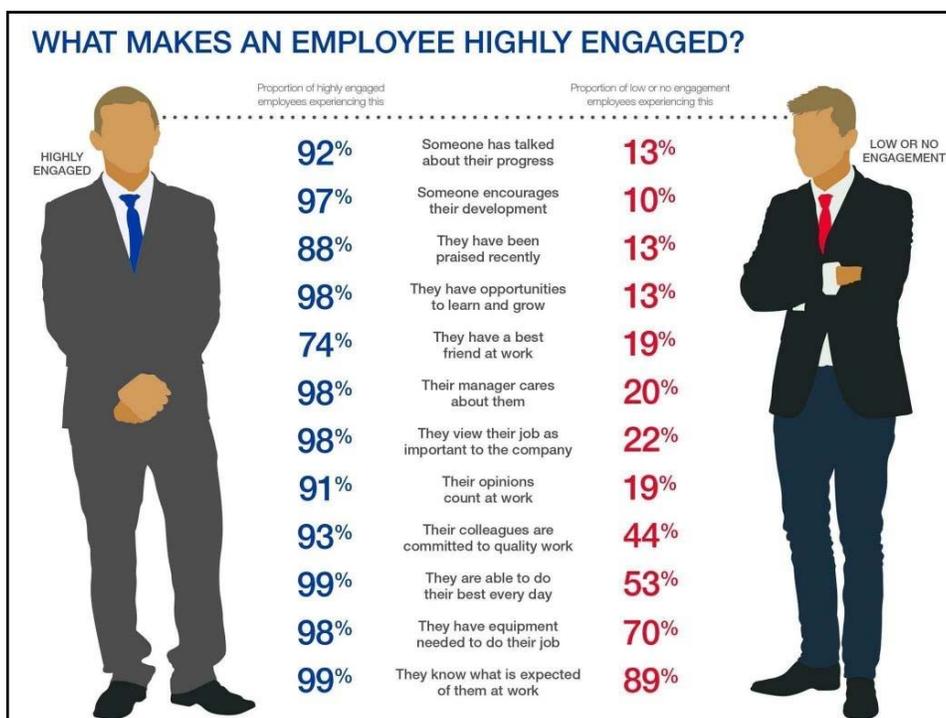
- Unrealistic Expectations
- Lack of Fundraising Support from their Executive Director

How can you, as a manager, set realistic goals and expectations?

How can you, as a manager, improve your own fundraising skills?



S. Z. Panetta & Associates, LLC



ON-BOARDING

- **30-60-90 Day Plan**
 - Preferred learning style?
 - Preferred communication style?
 - Preferred recognition/motivators
 - Networking meetings
 - Task-specific training
- **Checking In**
 - Questions: *What surprised you most today? What resources or training would be helpful? What obstacles have you come across?*



S. Z. Panetta & Associates, LLC

REALISTIC EXPECTATIONS

Studies show fundraisers take 18 months–3 years to become effective at a new organization.

Donor-Centered Leadership

What *IS* realistic?



S. Z. Panetta & Associates, LLC

“WHAT GETS MEASURED, GETS DONE.”

- Quantitative Goals – MEASURABLE results
 - What behaviors will lead to the outcomes you need?
- Qualitative Goals – HOW we do the work
 - Demonstrating support for mission
 - Supporting team goals
 - Pursuing professional development



BEST PRACTICES IN GOAL-SETTING

- Track and measure the behaviors that lead to success
- Focus on no more than 3-5 measures
- Use a transparent – *and simple* – measurement process
- Start with the end in mind



EXAMPLE: Leadership Gifts

What activities lead to success – i.e. dollars raised?

- Face-to-face visits
 - Rule of thumb: # of visits = # of prospects
- Asking for gifts
 - Must agree what constitutes an “ask”
- Engaging volunteers
 - # of joint visits? # of volunteers engaged? \$\$\$?



S. Z. Panetta & Associates, LLC

WAYS TO KEEP KEY STAFF ENGAGED

- Mentoring
 - Formal programs vs informal programs
 - Internal mentor/mentees vs external
 - 1:1 Mentoring vs Peer Group Mentoring
- Coaching
- “Read to Lead” Groups
- Continuing Ed opportunities



S. Z. Panetta & Associates, LLC

DO YOU SPEND TIME ON HIGH PERFORMERS...

...or low performers?

- Highest ROI: making strong performers stronger
- Low performers = lower morale for high performers
 - High performers CAN leave
 - Low performers deserve to be in a role/at an organization where they CAN be high performers



S. Z. Panetta & Associates, LLC

ARE YOU THE PROBLEM?

- Research shows development directors crave engaged leaders who support their work: *What are you doing to demonstrate your own engagement? What do you do to continue honing your own skills?*
- “Stay” interviews: *Do you know what recognition is meaningful to each employee?*



S. Z. Panetta & Associates, LLC

QUESTIONS? ANSWERS?



S. Z. Panetta & Associates, LLC

REFERENCES

- Burk, Penelope. *Donor-Centered Leadership*. Cygnus Applied Research, Inc., 2013.
- Covey, Stephen R. *The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change*. Simon & Schuster, 2013.
- Entelo study shows when employees are likely to leave their jobs. October 6, 2014.
<http://blog.entelo.com/new-entelo-study-shows-when-employees-are-likely-to-leave-their-jobs>



S. Z. Panetta & Associates, LLC

ADDITIONAL RESOURCES

- **Employee Recognition Preferences Questionnaire** – have each employee fill it out so you know what’s meaningful to them. Download at <http://www.socialenterprise.ca/en/learn/nav/resourcelibrary.html?page=resourceDetail.tpt&iddoc=352503>
- **Stay Interview Questions** – find examples from the Society for Human Resource Management at <https://www.shrm.org/templatestools/samples/hrforms/pages/stayinterviewquestions.aspx>
- Want to learn **what motivates people**? Try *Drive: The Surprising Truth About What Motivates Us* by Daniel H. Pink. It’s a quick read with a Twitter Summary at the back: Carrots & sticks are so last century. *Drive* says for 21st century work, we need to upgrade to autonomy, mastery & purpose.
- Want to **work on your leadership skills**? Try *The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations* by James Kouzes & Barry Posner. They include exercises that are easy...and thought-provoking.



S. Z. Panetta & Associates, LLC



S. Z. Panetta & Associates, LLC

SARAH Z. PANETTA

SZPANETTA@GMAIL.COM

503-422-1893