

Philanthropy Officers: Securing these Forgotten Treasures through Strategic Onboarding

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Philanthropy gift officers are the catalysts who ensure successful philanthropy and mission achievement happen in health organizations. Often overworked and underappreciated, these forgotten treasures of philanthropy are rarely long-term contributors due to high turnover. In [Part 1 of our series](#), we reviewed the challenges of retaining these forgotten treasures and initial steps to keep these high performers for the long haul. Let’s dig a little deeper.

Although it is well researched and well known, the awareness that turnover is still so prevalent has done little to change this trajectory. How can we improve health care organizations’ rates of retention and honor these hidden treasures who make such an impact on our missions? With strategic recruitment and onboarding. Consider these essential characteristics of strategic recruitment and onboarding that can be implemented to not only ensure smooth entry but to also set the expectations and standards that will encourage longer tenure.



1. STRENGTHEN THE INTERVIEW PROCESS

The first step to ensuring retention is to get the right people in the right seats on the organization’s bus. This must be accomplished in the interview process. The following questions should be included in the interview conversation even if the candidate is known by colleagues. Having worked with people in the past does not suffice when selecting

the right candidate for the job unless these candidates also provide satisfactory answers to these questions:

- What's your interest in our mission? How does our organization's work resonate with your professional and personal interests?
- Why are you leaving/did you leave your last job? (If vague, ask what their last manager would say for the reason for their departure)
- What do you consider your most successful role in fundraising? Why?
- What did you raise annually in the last fiscal year? In the previous year and in the year before that?
- What is the largest gift you have solicited and closed by yourself? And with a team?
- What was your most complex fundraising experience? What was the size of that gift? What made the experience challenging?
- If you perceive growth in their answers, get granular: What specific steps did you take to achieve this growth? Was this growth directly through you or others?
- How do you track and review your performance in reaching goals?¹

Many times, health care organizations assume they must hire locally to ensure a leader is someone who understands the local culture and is trusted by board volunteers. This is almost always debunked when the right hire with a commitment to professionalism, immersion into the community and a focus on raising local dollars is properly onboarded. As new hires remain respectful, listen attentively and communicate effectively, they create perfect opportunities to rapidly engage the board and other leaders to grow trust and move forward together.

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2. IMPLEMENT STRATEGIC ONBOARDING

Once the right candidate has been selected, you must ensure that onboarding as a newcomer is done well and in an organized and comprehensive fashion. This is especially challenging if you are in a health care system where not all philanthropy officers report into the central system office. However, even in decentralized or newly formed system philanthropy programs, there are ways to ensure you provide the onboarding necessary to

elevate philanthropy initiatives while also working with hospital presidents to ensure their human resources teams provide effective orientation within their organizations. Let's review six essential characteristics of strategic onboarding recommended for successful entry into new roles:

- **Invest:** A smooth on-ramp to your organization from the first day is important, but don't stop there. Onboarding is an investment in newcomers' learning that takes place over time. Make sure your hiring manager and HR department have the time and resources needed to implement a strategic onboarding process.
- **Chart the course:** Communicate a schedule of activities so newcomers know what to expect during their first weeks and months on the job.
- **Clarify expectations:** Hiring managers should discuss employees' roles and expectations, as well as how team members will be evaluated.
- **Appoint onboarding partners:** Identify a colleague who will serve as a dedicated resource partner during the first year of each newcomer's employment.
- **Keep it simple:** Focus your onboarding programming on the practical knowledge gift officers need to get up to speed.
- **Clarify objectives:** Be clear about what your onboarding is trying to achieve and stick with it.²



3. CONTINUE TRAINING

Depending on your location in the world, finding a philanthropy professional who also has health care experience is very challenging. Candidates are often coming from education, arts and other social services where they have been successful but are not familiar with the dynamics and nuances of the health care industry. If you have a non-traditional candidate, training should ideally be offered to ensure knowledge is gained early in the tenure of employees to help them immediately understand health care context and strategy. Training should include philanthropy-specific opportunities offered by the Association for Healthcare Philanthropy (AHP), Association of Fundraising Professionals (AFP) and industry consultants, as well as suggestions of other resources that will continue to help employees understand both health care and philanthropy. These could include books and articles by sector leaders and industry newsletters from organizations such as Becker's, Modern Healthcare and American Hospital Association. In preparation for training, keep an up-to-date folder on the latest resources that apply to your organization.



4. INSIST ON ACCOUNTABILITY

As philanthropy programs mature, accountability has become a key aspect of the culture that may be uncomfortable for some staff. Metrics are critical to success with a comprehensive campaign and must be used. The challenge for any health care organizations that are not centralized is a lack of direct reporting structure between the site leaders and system leaders. Moving forward, these metrics should be socialized with the hospital presidents (or whomever the site leader reports to) and should be included in the site

leader's annual goals for partnership with system philanthropy. An even higher level of engagement includes the opportunity to have philanthropic goals and metrics included in hospital presidents' annual goals. When those executive leaders see their personal goals impacted by philanthropy, they will be more inclined to partner with system leadership to design fair metrics and to work with site leaders to successfully achieve these metrics.



5. DEVELOP A CAREER LADDER

The lack of opportunity for promotion can impact turnover. A career ladder should be developed, updated and communicated to help preemptively avoid turnover. Because philanthropy full time employees (FTEs) are often in direct competition with clinical staff for limited resources, there may be obstacles that don't allow for easy growth within philanthropy work, frequently resulting in individuals leaving for work outside of not only the organization but also philanthropy in general. Don't allow your program to have advancement available for only gift officers, for example. Have options available for all talent in the program to increase their chances of a longer tenure. Work with your human resources partners to creatively establish sublevels or external titles to recognize all team members' contributions in ways that make them proud and can easily be recognized as a commitment to their accomplishments and growth. Having the ability to move up in smaller increments is an easy way to entice high performers to stay with the organization and reward them for work accomplished well.

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6. EVALUATE SYSTEMIZATION OF PHILANTHROPY

As the industry sees more mergers and acquisitions, it has also seen successful efforts to systemize philanthropy to leverage organizational scope and resources that increase philanthropic dollars and return on investments. If you experience merger mania, consider how philanthropy could benefit from systemization. Pilot or test programs to see if you can identify early success or indications of success in smaller efforts such as shared accountability metrics or the creation of a system team to support planned giving, annual giving, data management and a comprehensive system campaign goal. A further push for formal systemization could provide additional benefits such as:

- **Alignment with system vision and strategy:** Philanthropy leaders are given a seat at the health care executive table to help identify strategic priorities that can be translated to charitable funding priorities to advance a shared vision and engage top-level donors.
- **Strategic budget allocations:** Moving resource allocation decisions for all philanthropy organizations to a central hub harnesses better business intelligence to direct, reallocate

or reconsider the use of resources to optimize charitable returns. By optimizing the “whole,” better stewardship and enhanced performance are supported.

- **Boundary-spanning funding priorities:** With today’s donors expecting their investments to achieve measurable social impact, having the ability to show donors how they can support local priorities that are part of multi-site strategies will be influential in their decisions to give to your organization.³

Systemization aids in moving an organization from a collection of individual efforts into an aligned and cohesive set of shared commitments. Systemization offers an opportunity to define and affirm the organization’s values, commitments and shared intentions. It offers clarity around what actions, words and priorities are valued by the organization. Pursuing systemization enables team members to lift their gaze from the priorities of their individual site to see the greater possibility of serving together as one.

Whether your health care organization is a stand-alone facility, part of a multi-state system or somewhere in between, you are likely experiencing the trials of keeping effective team members and their leaders. Retaining gift officers, our forgotten treasures, for the long haul is challenging, but not impossible. Strategic recruitment and purposeful onboarding can have a huge impact on philanthropy leaders’ tenures while allowing them to have huge and long-term impact on our missions.

About the Authors: [Heather Wiley Starankovic, CFRE, CAP](#), and [Pamela Ronka Maroulis, CFRE](#), are Principal Consultants with Accordant. Pam and Heather remain inspired by all things within health care philanthropy, with a special dedication to supporting and recognizing staff members along with the desire to create programs that keep talented and dedicated servant leaders within the field. You can reach Heather by email at Heather@AccordantHealth.com or by connecting through [LinkedIn](#). You can reach Pam by email at Pam@AccordantHealth.com or by connecting through [LinkedIn](#).

¹ <https://www.campbellcompany.com/news/hiring-retaining-nonprofit-fundraisers>

² *You Had Me at Hello*, Sarah Andrews, AHP Healthcare Philanthropy Journal, Fall 2016.

³ *Systemization of Healthcare Philanthropy 2.0*, Betsy Chapin Taylor, AHA Trustee Services.