Perspectives

Finding the Right Health Care Philanthropy Officer: **The Interview**

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Please indulge me in this brief flashback…

“So, you call yourself a gift officer,” the interviewer says to me. “Let me tell you how it works here. In our organization, you are not a gift officer unless you identify a new prospect, engage that prospect, connect that prospect to a partner in our organization, solicit that prospect yourself (and not just on paper or through someone else), overcome their objections, close the gift, steward the gift and then celebrate the donor and gift.”

WHEW. It was a lot to take in and consider.

Does this line of questioning sound familiar? If you are a current gift officer or other philanthropy executive, you know the whole interview drill. While transaction-focused job descriptions and recruitment may have worked in the past, there are much more effective and efficient strategies for the everchanging health care philanthropy environment.

In my former life as a philanthropy executive, I quickly learned that philanthropy based on transactions didn’t feel philanthropic at all. In my efforts to pivot to donor-focused philanthropy, I set out to build a team with the same philosophies. It started with recruitment, so I compiled quite a list of questions and strategies as I searched for our next great philanthropy leaders. Questions and interviews based on donor engagement and cultivation

identified potential leaders who were excited to elevate our mission through relationships, as opposed to just adding transactions. In fact, I recently received a phone call from a former hire who is now using the same question set to identify philanthropy officers motivated by making the philanthropy connection and those only keeping track of their wins.

I couldn't be more excited that this line of donor-based questioning has been and continues to be successful for others in our noble field. Being called a philanthropy gift officer doesn't just mean you have added to the bottom line within the timeframe of a campaign. Being a successful philanthropy officer means you are consistently identifying, engaging and cultivating relationships that continue to elevate your mission. Following this roadmap and philosophy of transforming prospects to donors and lifelong partners through a relationship-based process—from interview, to onboarding, to mission achievement—can make anyone proud to call themselves a philanthropy officer.

Philanthropy officers can come from many previous backgrounds. They can often be nurtured and taught most everything they need to know to be wildly successful for your organization. They can be, and have been, pulled from professions such as former teachers, hospital administrators, department store managers, political fundraisers, salespeople, bankers, pharmaceutical representatives, marketers, journalists, designers, pastors and more. I am personally amazed at the number of art historians turned gift officers. What often matters is not WHAT applicants have done but HOW they have done it. You discover these jewels through specific interview questions.

What does a wildly successful philanthropy officer look like? It is not about just meeting the metrics or benchmarks. It is not about attending every meeting. It is not simply about checking things off the many lists. It is about creating, managing and advancing relationships outside of and within the organization for the betterment of the organization and mission achievement. An increased bottom line is the result of this type of ongoing engagement.

Aligning values is key in successful officer/organization relationships. I recommend focus on two values that are critical to recruiting (or being) a philanthropy officer. Expanding these values throughout the entire team helps to ensure you have the right members in the right roles on your philanthropy team:

> **SERVICE:**
> Philanthropy officers must be service leaders, or for those inspired by Robert Greenleaf, servant leaders.[1] This focuses on individuals, how they interact with others, how they build relationships and how they establish authority through partnership rather than power. This is a necessary internal fire that is required and often cannot be taught. Actions and motivations must reveal a people focus. Those motivated by money or simply the win of a lucrative solicitation may provide some short-term success but will likely result in a long-term impact that doesn't match the success of those motivated by service.

COURAGE:

Courage is not to be confused with recklessness or overconfidence. Courage is similar to fearlessness; however, it means that although feeling afraid, still pushing forward for the good of the organization and mission. Successful philanthropy officers exemplify courage because they care more about the organization than the fear of possible failure. It takes courage to practice "the pause," in waiting for solicitation responses, giving donors time to consider opportunities to advance their beloved organization. It takes courage to know when the pause has had time to be effective and to then follow through. It takes courage to address a room of 20 or of 1000 people. It takes courage to simply make the ask.

Courage is more easily attainable and taught than servant leadership. Courage is contagious. Courage is built. Most find that once an attempt is successful, excitement builds to continue forward. Courage combined with service and hard work can make a huge impact for your organization.

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When it's time to search for a philanthropy officer, your human resources team will likely provide you with many of the technical questions. Potential candidates' resumes will share pedigree and experience. I suggest, however, that you test drive applicants' values and heart over tactics. Start with questions like:

- Who is one of the most inspiring people in your life and why?
- Have you ever had someone reach out to you for philanthropic support? What was the approach? How did that make you feel? What would you do differently?
- If you are not reaching your work goals and metrics, how do you stay motivated in your role?
- What is the biggest impact you wish to make for this organization? How do you envision this happening?
- Recall a donor or prospect interaction that was difficult. How did you address it?
- How do you (would you) handle rejection from outreach efforts?

- Let's talk about donor identification and cultivation (convert to future donor identification if they have no philanthropy background). How have you identified new donors and better connected them through your past organizations? How did you identify their values and passions? What steps did you take to match donor passions to organizational priorities? What was the impact or result of these connections? What would you do differently at this organization?

Let's revisit my interview flashback. We don't want to simply discuss transactional questions and experience. We don't want to prioritize the never-ending list of all the things that must be checked off. We want to find leaders who live what philanthropy truly is…love of people, not transactions. They are out there. They are looking for the right fit. With your guidance, they can become long-term treasures of our organizations and our noble missions.

About the Author: Heather Wiley Starankovic, CFRE, CAP®, is a Principal Consultant with Accordant. She remains 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.

[1] Robert K. Greenleaf Center for Servant Leadership