



Validation Study

Profiling Successful Senior Fundraisers

Research Proposal

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1. Executive Summary

With a challenging economy facing the UK, the pressure to appoint, develop and retain highly effective fundraisers is growing. In response to this difficult economic climate, and building on their assessment expertise in the not-for-profit sector, NFP Resourcing have teamed up with eras ltd to undertake a validation study to research and communicate the preferred styles of working associated with effective performance at a senior fundraising level.

The validation study will be undertaken with the support and input of the Institute of Fundraising who are the leading professional body representing best fundraising practice in the UK.

The detail of the project objectives and proposed research methodology are set out below. NFP Resourcing aims to publish the outcomes of the validation study in January 2009.

2. Purpose and rationale

In the charity and not-for-profit sectors the search for effective and successful senior Fundraisers continues and against the background of a worsening external economic climate, the impact of making a poor selection decision becomes more significant.

Research carried out by The Institute of Fundraising has identified that members report that making the right appointments is a key barrier to success.

In order to address this issue and to continue to provide clients with effective selection tools, NFP Resourcing have formed a strategic partnership with eras - the publishers of a comprehensive preferred styles of working Questionnaire - the "QUEST Profiler". This Questionnaire is designed to measure a number of behavioural preferences related to the world of work and can be used as a powerful tool to understand how a person is likely to behave within an organisational setting.

The strategic partnership between eras and NFP Resourcing offers the NFP executive selection team the opportunity to launch a validation study to test out and research the insights and data they have collected on senior fundraisers with reference to the behavioural preferences model used in the QUEST Profiler personality Questionnaire.

The validation study will include collecting a number of completed QUEST Profiler Questionnaires from senior fundraising managers. The participants will need to evidence a broad spectrum of competence - from those deemed to be highly effective to those with development needs.

3. Project partners

Institute of Fundraising

To be confirmed.

To increase the potential for participation in the study the Institute of Fundraising has been approached with an invitation to be a partner in the study.

An exploratory meeting between Lindsay Boswell, Chief Executive of The Institute of Fundraising, Alison Beesley-Longstreeth, Simon Lloyd of Nfp and Alex Pearce of Eras is scheduled for 24 October.

NFP Resourcing Ltd.

Established in 2002, NFP Resourcing is an experienced and respected Recruitment and HR consultancy.

NFP offers a track record of working with charities on the recruitment, assessment and selection of senior appointments including for senior fundraising roles, where the sector is experiencing high levels of turnover.

The Company is committed to enabling clients to maximise their overall spend on recruitment. For example NFP has invested significant resource in keeping abreast of the potential and power of online recruitment technology. This in turn provides their clients with access to a greater pool of potential applicants.

The NFP executive selection team includes Director level HR practitioners supported by experienced Occupational Psychologists. In the course of their work, the team has developed a unique insight into the performance and profiles of applicants for senior fundraising appointments.

ERAS Ltd

With more than 25 years experience, **eras** has something to offer organisations large and small, local and multi-national, covering both the private and public sector. From the moment you think about recruiting staff to the point when they leave your employment, they can provide services and products, including cutting-edge range of psychometrics and associated training.

Since its formation, **eras** has built up an extensive client portfolio and now regularly works in partnership with hundreds of clients across the UK. **Eras** have successfully delivered an extensive range of interventions, psychometric products and training to a wide diversity of companies.

4. Objectives

We propose the following objectives for the study:

- To work with project participants and stakeholders to collect performance data and completed QUEST Profilers from a pool of highly performing senior level Fundraisers and from senior Fundraisers with development needs.
- With the consent of study participants, to carry out a desk review of NFP Resourcing executive appointment assessment data of appointed candidates where this can be validated against on-the-job performance.
- To develop a hypothesis of the likely profile of a successful senior level Fundraiser, informed by the research data collected to-date.
- To map this hypothesis against the completed QUEST Profiler Questionnaires in order to identify personality dimensions of potential significance.
- To develop a shared and professionally validated understanding of both the personality profile of a successful senior-level Fundraiser together with an understanding of how they may behave in an organisational setting.
- To share this profile with project participants and project sponsors.
- To investigate ways to licence the profile and make it more readily available at a reasonable cost to the charity sector.

5. Research methodology

Stage 1 - Developing a hypothesis for high performing senior Fundraiser

Using all relevant sources e.g. project participants, stakeholders, NFP assessment data; the research team will:

- Convene a meeting between project stakeholders to discuss and agree the proposed methodology, confirm information requirements and likely sources, clarify areas of responsibility and clarify proposed project stages. It is likely that at this stage agreement will be reached regarding what additional data should be included in the validation stage to ensure that as many components of the assessment procedure as possible can be analysed and reviewed.
- Identify a sample of high and lower performing fundraisers that would be willing to participate in the study. Participants should be agreeable to completing the QUEST Profiler Questionnaire and their level of performance will need to be 'validated' by relevant performance data. However the participants do not necessarily need to know whether they are deemed high or lower performers
- Gather relevant competency data about Fundraisers e.g. conducting critical incident interviews with actual Fundraisers or rep grid interviews with their Managers to identify key characteristics that relate to successful and less successful Fundraisers.
- Using qualitative data analysis; identify key competencies that differentiate high performers from other performers, with eras ltd producing a rating form against this set of key competencies
- Map the competencies onto the QUEST Profiler Questionnaire to form a hypothesis relating to the profile required for high performing senior Fundraiser.

Stage 2 - Testing hypothesis using QUEST Profiler Questionnaire, data manipulation and coding

Using a larger sample of Fundraisers - ideally of around 80 - the research team will:

- Code all performance data e.g. clearly indicating high and lower performance
- Ask all participants to complete a QUEST Profiler Questionnaire. It is envisaged that the personality assessment will be conducted via the internet.
- Conduct relevant statistical analyses on the data to identify key traits that predict high performing fundraisers and those that are potential inhibitors of high performance.
- Compare to hypothesis developed in stage 1.
- Interrogate any discrepancies with further statistical analyses.
- Develop a profile for the successful senior Fundraiser.

Stage 3 - Reporting results

Once the analysis has been conducted the project partners will publish a management summary report of the key findings and implications of the analysis.

The key findings will focus upon the relationship between performance data, personality and selection data.

6. Research Team

Nfp Resourcing has brought together a multi-disciplined team of consultants who are able to offer particular expertise and experience for each of the different aspects of the research project.

The research team can evidence extensive experience of both the development and application of personality profiling as part of an overall approach to executive assessment.

Members of the team also include two consultants who have direct experience of the recruitment and performance management of senior fundraising managers. Short profiles of project team members are included in Appendix 1.

7. Indicative Timescales

The project will be introduced to attendees of an event on 27th November to re-launch NFP Resourcing executive search and selection services. Attendees will be invited to participate in the research study.

This will be supplemented by additional marketing from both NFP Resourcing and the IOF (tbc).

We anticipate the research aspect of the project taking around 4 weeks and aim to publish results in January 2009.

Appendix 1 - Project personnel

Dr George Sik, ERAS - Consultant Psychologist

BSc (Hons), PhD, C. Psychol, AFBPsS, CSci

George Sik is one of the most prominent psychologists in the country and has probably trained more people to use and understand psychometric tests and Questionnaires than anyone in the world. He has published on the use of personality assessment in the workplace in academic journals, HR publications and the national press and frequently comments on psychological matters on the radio and on television.

He has co-authored several well-known Questionnaires, most recently the QUEST Profiler™. He is also very involved in applying psychological techniques in sport - particularly personality profiling.

Alex Pearce, ERAS, Director of Assessment

BSc, MSc, C.Psychol, CSci, AFBPsS

Alex has been working within the field of Occupational Psychology since 1989. From the start of his career his experience has been diverse, ranging from working on the development of some of the most widely used psychometric tools in the world to delivering development interventions within the UK and internationally.

Since joining eras ltd in 2001, Alex has been instrumental in establishing eras as a provider of psychometric tools, most notably the QUEST Profiler™, one of the fastest growing personality Questionnaires in the UK. This together with the development of the 360 degree assessment and Level A and B (intermediate) training means Alex has overseen growth in the psychometric are of 40% per annum.

Alex has worked with a wide range of organisations, both large and small, on assessment and development programmes, assisting them to identify talent and improve employee performance. His experience as a Board Director coupled with his practical approach to people development helps ensure that any assessment and development interventions are relevant to the organisationl

Alison Beesley-Longstreeth, HR Director, Nfp Resourcing

FCIPD, BPS Level A & B

Alison leads on executive selection. She is a senior Human Resources professional with extensive management experience gained within the Voluntary and Retail sectors. For 10 years Alison operated at board level within the RNIB. Here Alison led a team of twelve and directed activities around recruitment, retention, staff development, reward, equalities and corporate volunteer development and staff consultation.

She has achieved Fellowship status with the Chartered Institute for Personnel Development in recognition of her expertise in role analysis, selection and assessment and for her contribution to the strategic management of reward within the voluntary sector.

HR consultancy support including - Executive Senior Appointment recruitment, HR Audit, out-sourced HR support, remuneration reviews, role analysis and competency development and coaching for senior managers. Key areas of strength are workforce planning, developing and implementing organisational change management strategies through best-practice models.

Her qualifications, training and memberships include:

- Diploma in Personnel Management - *Distinction*
- Fellow of The Chartered Institute of Personnel Development
- The British Psychological Society Certificate of Competence in Occupational Testing, Level B Intermediate
- Accredited to administer William Mercer job classification scheme
- Certificate in marketing practice
- Professional accreditation to Dfes Independent Assessor
- Saville & Holdsworth Assessment/Development Design
- Job Evaluation and Reward conferences
- Neuro-linguistic programme (NLP)

Frances Wright,

B.Sc(Hons), PG Dip. Occupational Assessment, FCIPD

Frances heads up our executive search and brings board level executive assessment, coaching and mentoring experience as an independent consultant, HR Director and Non Executive Director in both the commercial and the public sector. She was formerly Group HR Director SHL Group Ltd., the worldwide supplier of people development and assessment tools and brings 20 years experience at HR Director level in a range of organizations.

She is experienced in the management of change and in all aspects of resourcing, including the use of psychometrics in recruitment and development and in the design and running of assessment and development centres.

Consultancy interventions have included Development of Group wide HR Policies to support culture change, career counselling and coaching at executive level, individual and group Assessment Centres for selection and development.

Frances is a Chartered Fellow of the Institute of Personnel Development and has a Post Graduate Diploma in Occupational Assessment. She is an Associate Consultant with the SHL Group. She is currently a Non Executive Director of a NHS Foundation Trust Hospital and was previously a Non Executive Director with the DVLA.

She is a Director of the Devonshire House Management Club (www.devonshirehouse.org) which provides a forum for senior professionals from a wide range of business and public sector organisations to develop understanding of the issues affecting their organisations.

Her qualifications, training and memberships include:

- BSc.Soc.(Hons) London
- Post Graduate Diploma in Occupational Assessment (University of Surrey)
- Chartered Fellow, Chartered Institute of Personnel Development
- British Psychological Society, Level 2 accredited test user.

Dina Butler

MSc Personnel Management, CMCIPD, BPS Level A & B

Dina brings 17 years HR and Assessment/ development experience gained in both the commercial and public sector. She has worked as a freelance consultant since 2000 and as an assessor since 1991.

Dina is fully trained in biographical, situational and critical experience / competency based interviewing. She brings a wide range of assessment / development experience from panel interviews to assessing & chairing extended selection procedures at all levels from front line to graduate to senior managerial, specialist and executive.

Her experience also includes designing sift criteria, sifting and telephone interviewing and the design and delivery of a number of assessment related training products (sifting, telephone interviewing, board administration, career planning & assessor training), 1:1 and small group coaching & feedback. She is also a qualified Assessor Tutor (5 day accredited assessor training course).

Her other qualifications are:

- BSc (Hons) Microbiology and Virology - 2.1
- MSc Personnel Management and Business Administration
- Chartered Member of the Chartered Institute of Personnel and Development (Chartered MCIPD)
- BPS Certificate of Competence in Occupational Testing (Levels A and B)
- Accredited user of OPQ, MBTI, RPQ, MQ, 16PF5
- Postgraduate certificate in Psychotherapy
- Diploma in Clinical Hypnosis (with distinction)
- BTEC qualified assessor and accredited assessor trainer
- Other external training undertaken includes Career Development (CBI), Career Counselling (ICAS), Employment Law (IRS), Competency development, Job analysis, Salary Management (Hay), 16PF5, Assessment Centre Practitioners (A&DC), Executive Coaching (Quorum), Targeted Selection (DDI), Life coaching (LCCH).

Alison Trott

MSc Occupational Psychology, BPS Levels A & B

Alison is a chartered occupational psychologist with fifteen years experience of working with both private and public sector clients in the areas of assessment, development and managing diversity.

She is an experienced assessor and brings a range of assessment skills to both individual and group assessment/development centres, value and competency based interviews, producing development reports, delivering feedback to and coaching managers at work.

Alison is experienced in the design of bespoke job simulation exercise and administering standard psychometric tests as well as interpreting and feeding back results.

A particular strength is her expert understanding of equal opportunities and managing diversity and the auditing of organisational policies and practices, make strategic recommendations and raise awareness amongst employees.

Other qualifications, training and memberships includes:

- Certificates of competence in occupational testing (levels A and B intermediate); Morrisby Vocational Assessment Profile; OPQ; Myers Briggs Type Indicator; WAVE.
- Executive Coaching by Institute of Coaching and Consulting Psychology, University of Sydney.
- Member of the British Psychological Society
- Full member of the Division of Occupational Psychology.
- Principal Member of the Association of Business Psychologists.
- Member of the BPS Special Group in Coaching Psychology.

Simon Watkins

BA(Hons), CMCIPD

Simon has worked as a management consultant and interim manager working in the arena of psychological assessment and people development. His experience of Assessment & Development Centre design and implementation is extensive, both as an external consultant and as an HR Manager, altogether spanning some 15 years.

He was formerly a Managing Consultant with SHL. In this role he delivered a wide range of HR consultancy services including the design and implementation of assessment centre programmes for selection and re-structuring, in the UK and in Europe; design of structured, scoreable application forms for managerial, graduate and customer service selection; design of bespoke simulation exercises for assessment and development applications; 360 degree development interventions up to Board level, and job analysis and competency design work.

Simon's experience includes the delivery of executive and managerial training and while at SHL he was Course Director of the Occupational Testing and Occupational Personality Questionnaires courses; Interviewing skills and Appraisal skills.

Simon's qualifications, training and memberships include:

- Chartered Member of the Chartered Institute of Personnel and Development
- Postgraduate Diploma in Personnel Management.
- Accredited to use the OPQ, MBTI, CPI and Margerison McCann TMS.

Mike Caudrey

Founding Director, BlueSpark Consulting

Mike is Founding Partner of BlueSpark Consulting (www.bluesparkconsulting.com), he extends and enhances our search with his detailed knowledge of the movers and shakers in the nfp sector.

Mike is well known for his expertise and his strong focus on the effective management of change and integrating people, processes and technology to tackle the most challenging management issues. He was formerly Managing Director of Horwath Consulting, the management consultancy arm of Horwath Clark Whitehill.

After qualifying as an accountant in industry, Mike held senior line management positions in corporate planning, logistics management and information technology. He joined what was Clark Whitehill Consultants in 1986 and has since worked with a wide range of commercial, public and voluntary sector organisations. Much of his consultancy work has been in helping organisations to introduce the most effective and relevant governance and management structures and practices.

Mike has held a number of other charity trusteeships and has played a leading role in both the trade union sector and the management consultancy profession.