



Deploying High-Impact Skill Building

The Professional Development Playbook Part II

Advancement Forum

Speeding Best Practice Adoption

A Resource to Get You Started



Advancement Forum

The Professional Development Playbook Part I

Translating Insight Into Action

A Discussion/Self-Reflection Guide to Speed Best Practice Adoption

Instructions:

Use the following discussion/self-reflection guide and related implementation tool at the conclusion of the webconference to help you prioritize the implementation of the best practices provided based on your institution's goals, available resources, and timeline.

1. In what way do we currently assess the skill gaps of our team? How might we improve upon our current processes?
2. What are the predominate skill gaps on our team? Are there any that overlap position areas?
3. How might we begin to engage our staff in understanding their training wants and needs?
4. What are the questions we are most interested in having staff feedback/input on? How do we want to deploy these questions:
 - Survey?
 - Self Assessment?
 - Focus Group?
 - One-on-One with Managers?
5. What work products to we require of staff which would help us understand training needs, identify potential training leaders, or assess gaps in skill?
6. What training do we currently provide managers or future managers?
7. Of the tools profiled in this work to assist manager-direct report relationship building which could be the most useful to the team?
8. What would we need to consider if we wished to employ their use? Who needs to buy-into their use? What kind of training or messaging would we need to provide to support their implementation?

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Source: Advancement Forum interviews and analysis.

The Professional Development Playbook Part I

Translating Insight into Action

Implementation Guide to Speed Best Practice Adoption

Instructions:

Based on your institution's professional development and skill building goals and available resources, map out which of the tactics profiled in today's webconference you want to prioritize in the chart below. Use this vision document to assign program responsibility and next steps.

Tactic	Immediate	Possible for Future	Not Applicable	Next Steps	Staff Assigned
HSG Skills-Based Needs Assessments					
Work Product Review					
Multi-Modal Diagnosis					
Manager Feedback Training					
Performance Aligned Professional Development Plans					
Professional Development Conversation Guide					
Comprehensive Career Map					

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Source: Advancement Forum interviews and analysis.

Stuck in the Past

Status Quo Professional Development No Longer Enough

Advancement is Less Innovative Than Industry Counterparts

Simulations	Gamification	Coaching
Role Play	Films, Videos, and Podcasts	Mentoring
Computer-Based Learning	Case Studies	Lectures and Conferences

Other industries have expanded

28%

of training hours are delivered with blended learning techniques

26%

of training hours are delivered via online or computer-based technologies

The majority of advancement organizations use traditional training models

"Go-To" Lectures, Conferences, and Mentoring Are...

✗ One-Size-Fits-All

"Right now, professional development looks the same for everyone."

✗ Time-Consuming

"Training can take a lot of time and the last thing we want to do is take peoples' time and then have them just put the binder on the shelf."

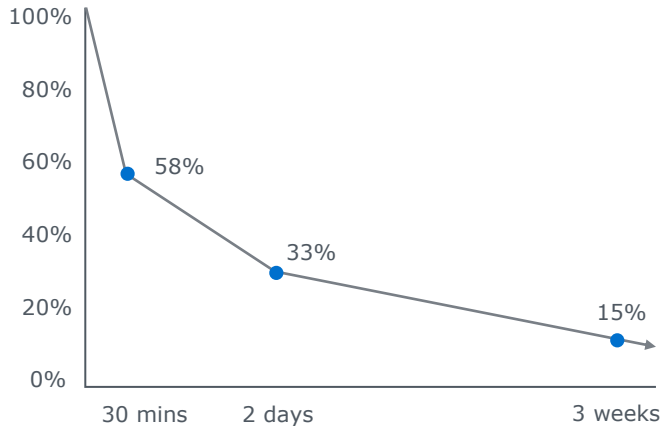
✗ Lacking in Outcomes

"Every organization uses conferences and group training sessions, only to find that they didn't really make a difference."

Outdated Trainings Spring Knowledge Leaks

Failure to Retain or Use Information Learned Raises Questions About ROI

Estimated Percent of Knowledge Retained after "One-and-Done" Sessions



A Potential "Money Pit"

25%

Of McKinsey-surveyed organizations said that their programs are effective at improving performance measurably

8%

Of organizations track their programs' return on investment

Source: Cermak J and McGurk M, "Putting a Value on Training," *McKinsey & Company*, July 2010, http://www.mckinsey.com/insights/organization/putting_a_value_on_training; Gottfredson C and Mosher B, "Innovative Performance Support: Strategies and Practices of Learning in the Workflow," file:///C:/Users/patelt/Downloads/ls11_mxc_fa103_moshergottfredson.pdf; EAB interviews and analysis.

Adapting Training to Today's Fundraiser

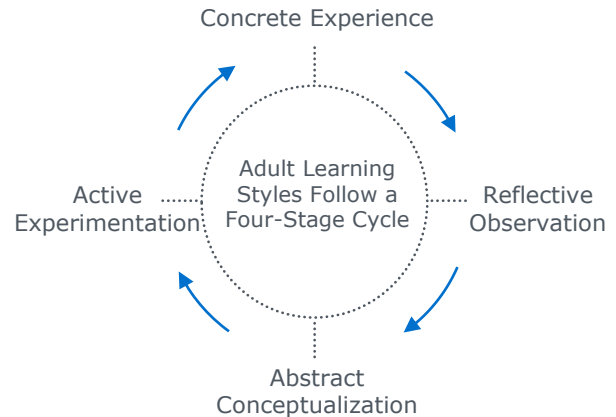
Professional Development Must Meet Adult Learning Styles

Two Prevalent Theories

Knowles' Four Principles of Andragogy

- 1 Adult learners need to be involved in the planning and evaluation of their instruction
- 2 Experience (including mistakes) provides the basis for the learning activities
- 3 Adults are most interested in learning subjects that have immediate relevance and impact to their job
- 4 Adult learning is problem-centered rather than content-oriented

Kolb's Learning Theory Model



The Professional Development Playbook



Formalize Professional Development Processes

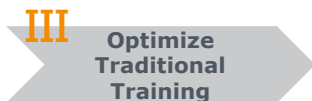


1. MGO Skills-Based Needs Assessments
2. Work Product Review
3. Multi-Modal Diagnosis



4. Manager Feedback Training
5. Performance Aligned Professional Development Plans
6. Professional Development Conversation Guide
7. Comprehensive Career Map

Deploy High-Impact Skill Building



8. Flexible Onboarding Matrix
9. Continuous Learning Touch Points
10. Outcomes Oriented Mentoring
11. Cohort Learning Communities



12. Targeted Joint Visits
13. Real-Time Strategy Coaching
14. Crucible Roles



15. Group Case Study Sessions
16. Simulation-Based Coaching

The Professional Development Playbook

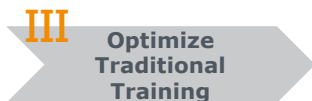


Formalize Professional Development Processes



Available On Demand @ EAB.com

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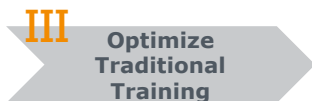
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Making Better Use of Traditional Training

Four Ways to Improve What You Already Do

Traditional Trainings

- 1 List of One-Size-Fits-All Onboarding Tasks
- 2 Classes, Conferences, and Webinars
- 3 Broad-Based Mentoring
- 4 Group Lectures



Enhanced Trainings

- Flexible Onboarding Matrix
Iowa State University Foundation
- Continuous Learning Touch Points
University of Michigan
- Outcomes-Oriented Mentoring Process
University of Michigan
- Cohort-Style Learning Communities
University of Florida and UC-San Diego



A Flood of Wasted Information

One-Size-Fits-All Onboarding Misses the Mark



Inexperienced Gift Officer

Resume

- 1 year of fundraising experience at a hospital
- Recent alum of the university
- Strong verbal communicator
- Proficient in data analytics



Experienced Gift Officer

Resume

- 10 years of fundraising experience at a small, liberal arts college
- Strong writing skills
- Past mentorship experience
- Proficient in Raiser's Edge

Onboarding Plan

1	One-hour check-in with manager
2	Attended orientation with all advancement unit leaders
3	Meet with Dean of the Humanities and Sciences
4	Attend training in Raiser's Edge
5	Two-hour session with Prospect Research
6	Meet with Dean of Engineering
7	Shadow Marla, MGO

Delayed Starts

90

Days necessary to be ready for the road

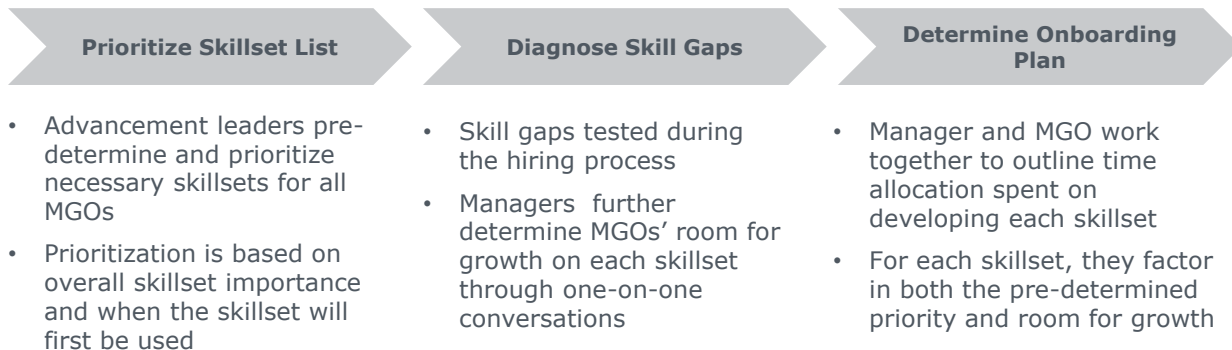
1st

Gift is only secured by the end of one year

Customizing Onboarding

Flexible Process Allows MGOs to Focus On Key Skillsets

Iowa State University Foundation's Pre-Onboarding Steps



Example Onboarding Plan

Skills	Session Title	Description	Timeline	Priority	Venue	Time Allocation
Closing Gifts	Effective Solicitation Strategies	"How to solicit a donor..."	30-60 days	A	In-person session	Attend one session
Pipeline Development	N/A	"Developing and deepening your pipeline..."	30-60 days	A	Supervisor Meeting	Attend four meetings

Meaningful Enhancements for Current Activities

Ongoing Learning Touch Points Reinforce Learning

Getting the Most Out of Classes, Conferences, and Webinars

Before



Pre-Conference
Form



Ongoing
Conference Value
Database



Manager
Discussions

During



Worksheets



"Lunch and Learn"
Guides



Interactive
Discussions or
Hands-On Learning

After



Post-Conference
Form



Post-Conference
Share-Out



MGO Homework
and Key Takeaways
for Managers

Solidifying Skill Integration

Post-Class Action Steps Prompt Discussions on Learning Outcomes

University of Michigan Post-Training Process

Homework for MGOs

Session: Visits and Donor Engagement

- READ _____
- REFLECT _____
- ACT _____



MGO



Manager

Key Takeaways for Managers

Prompts for Follow-up Questions

- General Questions
(e.g., *What are the highlights from the last session?*)
- Session-specific Questions
(e.g., *What ideas do you have for engaging prospects in new ways?*)

Sparking Professional Development Conversations

“The homework drives the gift officers to their managers and the follow-up email drives the managers back to the gift officers...this leads to a conversation about career development and which skills to prioritize and focus on.”

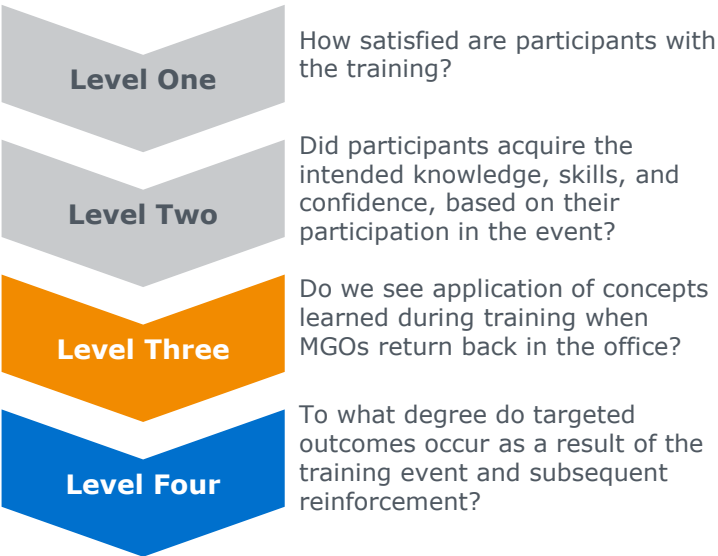
David Zubl, Associate Director of Development Learning Programs, University of Michigan



Measuring Beyond Satisfaction

Closing the Loop by Measuring Learning, Behavior, and Results

The Kirkpatrick Model of Evaluation



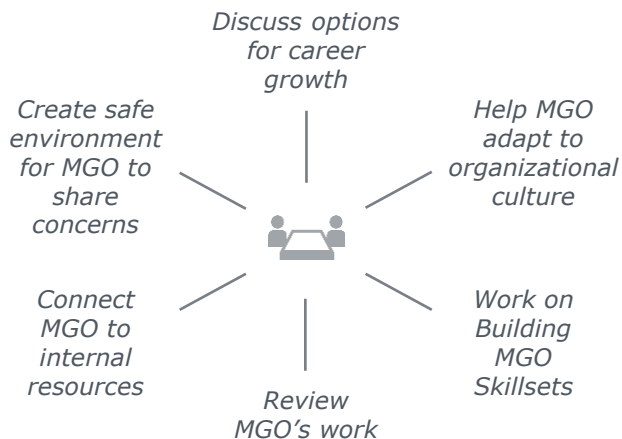
Managers Best Equipped to Measure Levels Three and Four



A Series of Coffee Dates and Lunches

Though Well-Intentioned, Broad-Based Mentoring Produces Low ROI

Unclear Mentoring Expectations...



...Produces Unimpressive Outcomes



Mentor

- Not sure where to focus mentorship relationship
- Feels like time is misused
- Fails to prove management prowess



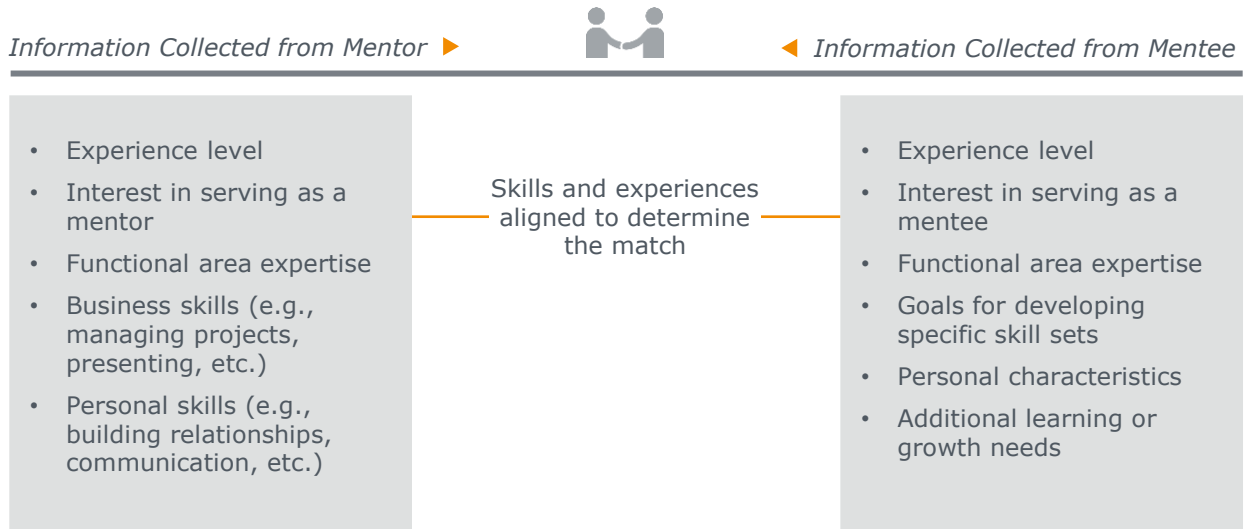
Mentee

- Asks manager and mentor same questions
- Unsure of how to use the relationship
- Disappointed by the program

Shifting to an Outcomes-Oriented Model

University of Michigan Mentoring Designed to Achieve Pre-Determined Goal

Creating Mentorship Matches



Harnessing the Power of the Group

Shifting From Point-In-Time Group Learning to Cohort-Style Learning



Traditional Group Sessions

One and Done

Lack of a continuous learning process leads to large knowledge leak

Unfocused

Content meets the average of group needs, rather than fitting individual needs

Not Interactive

Lecturers fail to involve attendees in discussions, role-plays, or other hands-on learning experiences



Cohort Learning Communities

Multiple Touch Points

Cohorts meet multiple times over an extended period in order to build relationships and solidify knowledge

Targeted

Members are grouped based on their pre-diagnosed needs. Content is built around a theme or skillset.

Collaborative

Members continuously interact with each other through the learning process



Facing Learning Challenges Together

“Cohorts work because staff all hit the same bumps at the same time and they can discuss how they go over them. The shared reference points and shared language is also so key.”

Sheila Steger, Senior Director of Individual Giving, University of Alberta

Building A Stronger Culture Through Cohorts



University of Florida Applies the Learning Community Model to New Hires

Key Elements of the Florida Fundraising Essentials Program



Year-Long Program

Early career fundraisers join each quarter and progress through each unit together; each of the four units includes three two-hour sessions

“The value of cohort learning comes with sharing multiple experiences with colleagues and learning from each other over time.”



Targeted Content and Delivery

Content is determined and refined through individual development plan analysis, conversations with managers, and continuous evaluation

“All programming is developed based on organizational need”



Collaborative Learning Environment

Each session includes interactive activities, followed by instructions for actionable next steps that directly relate to their role as a fundraiser

“Speakers now take into account how the audience learns and retains information rather than just hitting all of the talking points on their list”

90%

Participant retention rate

>90%

Participants agree or strongly agree that the program better helps them do their job

>95%

Participants are satisfied with the overall program experience



Beyond the Fundamentals



UCSD Organizes Cohorts For All MGOs Around Diagnosed Skills Gaps

UC San Diego Identifies Five Cohorts



Strategy Development

MGOs who need help in developing donor-centered strategies



Career Development

Younger MGOs who would benefit from hearing the experiences of senior MGOs



Pathways for Rising Stars

High potentials who would like to explore stretch roles and career options



Management Skills

New managers and managers that need refreshers in management skills



Management Alternatives

MGOs interested in strengthening their fundraising, rather than management skills

General Elements of Cohorts

- Four to six months in length
- Interactive workshops (e.g. discussions, role-play, coaching, on-the-spot strategy creation)
- Monthly group sessions interspersed with individual coaching sessions
- Homework in between sessions

The Professional Development Playbook

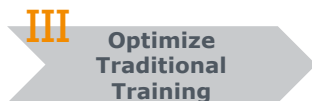


Formalize Professional Development Processes

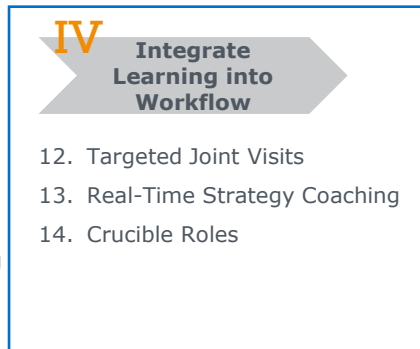


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Learning While Doing

On-the-Job Skill-Building Reinforces Learning

Benefits of On-the-Job Learning



Works with MGOs' busy schedules



Prompts immediate application of skills learned



Embeds feedback in real-time



Confirms integration of knowledge



Beyond Theory, Beyond Practice

"There is theory and there is execution. Fundraisers learn best on the job."

*Anita West, VP for Advancement
University of Redlands*



Tripling Impact

3x

The impact that on-the-job training has on employee performance versus traditional training

Bringing Training as a Carry On

Building Skills on the Road at Missouri University of Science and Technology



Pre-Visit

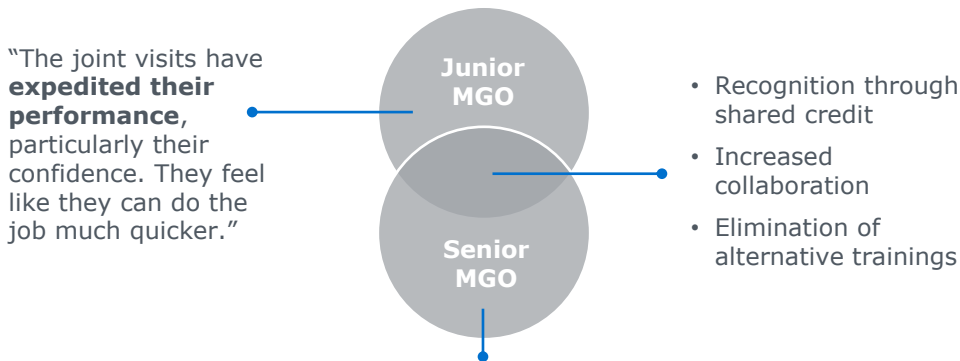
- Review prospect or donor background and profile
- Outline skills that MGO seeks to build
- Determine role of MGO during meeting
- Strategize and prepare a visit plan

Post-Visit

- Debrief about donor reactions and visit outcomes
- Review progress on skill development
- Outline next steps for donor or prospect
- Determine next steps for MGO

Incentivizing MGOs to Say “Yes”

Overlapping Benefits Prompt Active Participation in Joint Visits



Recognition on Performance Reviews

Integrative and Strategic Leader		People-Centered	
✓	Develops and communicates comprehensive vision, strategy, and clear purpose	✓	Invests in and develops others, unleashes talent in others
✓	Builds collaborative relationships with multiple stakeholders	✓	Practices “shared leadership”

Borrowing from a Known Partnership Model

Law Firm Model Builds Skills through Real-Time Coaching

Two Executive Sponsorship Approaches at University Hospitals

1 Development Officer (DO) Owns Prospect Relationship

- DO asks CDO, VP, or Senior MGO to act as Executive Sponsor for a prospect in her portfolio
- Senior leader provides strategy guidance and external-facing support as needed to DO

2 Senior Leader Owns Prospect Relationship

- CDO, VP, or Senior MGO asks DO to help with a prospect in her portfolio
- DO helps develop strategy and executes on back-end prospect work while senior leader maintains external donor relationship



Minimizing Senior Leader Time While Maintaining Senior Leader Presence

“Clients of a law firm know that they can’t always get the senior partner because they are too busy. As long as the partner stays in the process and transfers credibility to the associate, usually the client will be satisfied.”

Sherri Bishop, Chief Development Officer, University Hospitals

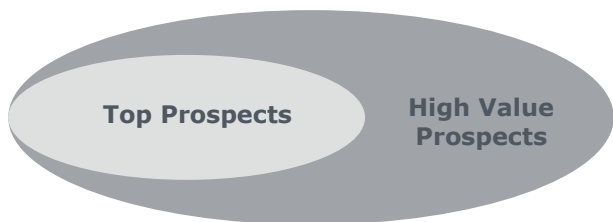
Increasing Reach and Revenue

Wider Focus Captures More High-Value Prospects

Prospects Reached Under Shared Model

Reached in a year *without*
DO assistance

Reached in a year
with DO assistance



Accelerated Performance

"Development officers accelerate their learning and performance curve. And every fundraiser is working on at least one \$5M+ gift."

*Sherri Bishop, Chief Development Officer
University Hospitals*



Anticipated Increase in Dollars

\$40M Annual goal for
cumulative \$5M gifts

In a Different Playing Field

Top Talent Have Outsized Impact and Separate Requirements

The Cost of Underinvesting in Top Talent



Top Talent Have Substantial Impact...

"A small number of impact players markedly affect the desired outcomes of our organizations, whether one considers bottom line production or influencing production through stellar leadership."

Amy Bronson, Boston University

...But Only if They Perform...



1 in 3 high-potential employees admits to not putting all effort into the job

...And Only If They Stay

25%

Of high-potential employees believe they will be working for another employer in a year

71%

Of employees said that stretch assignments unleashed their potential

Needs of Top Performers



Effective use of high-value time



Interaction with nuanced content



Increase recognition and options for growth



Opportunities to challenge and strengthen skills



“Baptism by Fire”

Procter & Gamble Develops Top Talent With Crucible Roles

Procter & Gamble Process



Leaders Emerge Through Accelerator Experiences

“True leadership development takes place under conditions of real stress—‘the experience within the experience,’ as one executive told us. Indeed, the very best programs place emerging leaders in ‘live fire’ roles where new capabilities can—or, more accurately, must—be acquired.”

Harvard Business Review, “How to Keep Your Top Talent”

Choreographing a Meaningful Crucible Moment

Waterloo Uses One-Time Assignments to Solve Organizational Needs

Typical Stretch Roles Pitfalls	University of Waterloo's Approach
✗ Detached from organizational goals	✓ Maintains a running list of top organizational priorities
✗ Misaligned with individuals' strengths, skill gaps, and goals	✓ Identifies overlap between individual goals and skills and organizational needs
✗ Unstructured, ill-defined, and unsupported	✓ Clearly defines process and timeline for role; supervisors, leaders, and peers provide support
✗ Fails to inspire leadership and growth	✓ Ensures that role is challenging, complex, and engaging
✗ Untracked impact	✓ Pre-establishes metrics and measures success
✗ Work goes unrecognized by senior leaders	✓ Recognizes achievements through performance reviews, temporary titles, senior leader access, or public announcements

Finding Leaders

"The best opportunities to grow are when you are under pressure and pushed to figure things out. Crucible moments can help us identify our leaders."

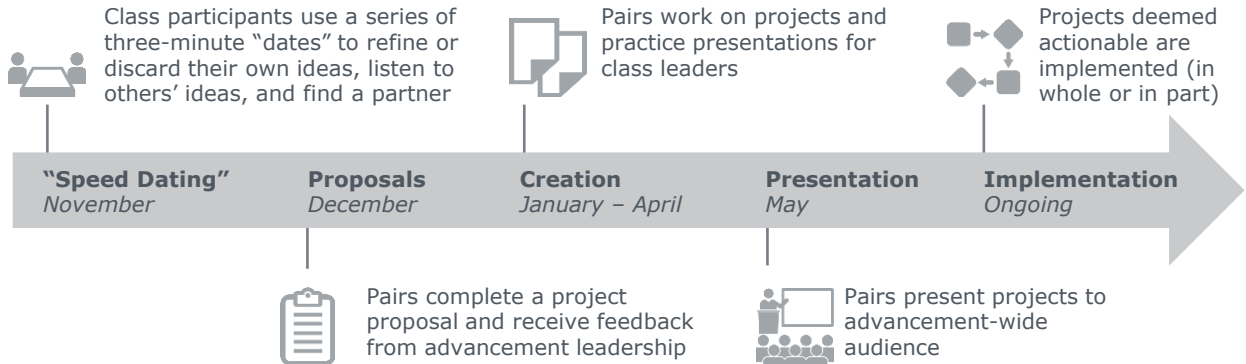
Mike den Haan, AVP of Principal Gifts, University of Waterloo



From Ideas to Concrete Action Steps

Intensive Active Learning Improves the Organization

University of Washington's Advancement Leadership Class (ALC) Capstone Projects



Learning to Execute High-Value Projects

"The projects teach staff to identify, create and execute on ideas that are important to the organization...when you give people this opportunity, amazing things come out of it."

Mark Lanum, Director of Donor Services, University of Washington



Have Your Cake and Eat It Too

Project Impact is Multi-Layered at University of Washington

Impact on Organizational Needs

Research conducted on a variety of organizational needs

- Stewardship and donor care
- Employee career advancement
- Predictive modeling/data analytics
- Cross-divisional partnerships

Select projects implemented, based on projected outcomes and staff capacity

A project titled "Warming up to Cold-Calling" turned into a cold-calling training program for frontline fundraisers run by student callers

Impact on Employee Engagement

Members of ALC class are retained at a high rate

>5%

Turnover rate for class graduates

Member of ALC class are promoted at a high rate

60%

Promotion rate for class graduates

48%

Standard promotion rate

The Professional Development Playbook



Formalize Professional Development Processes

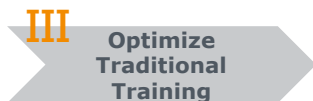


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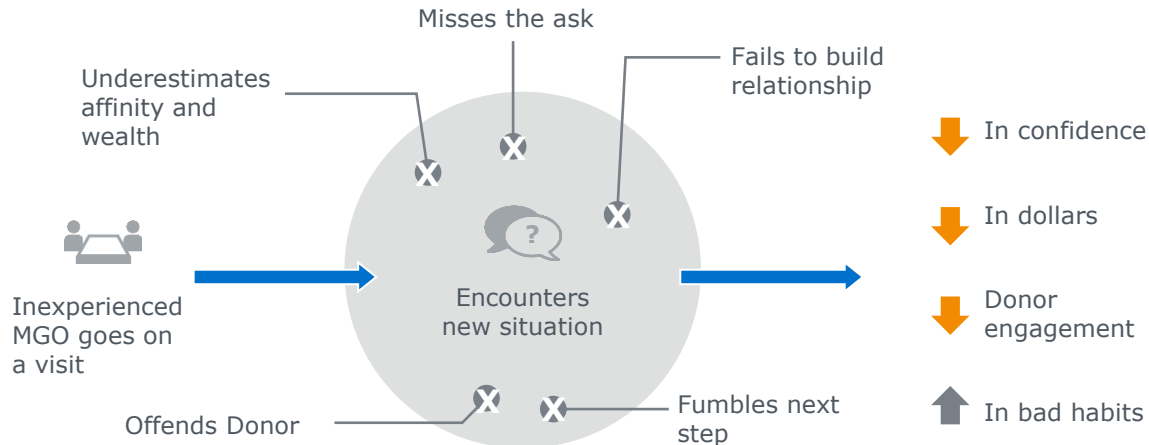


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16. Simulation-Based Coaching

The High Cost of Little Practice

Avoidable Missteps Have Outsized Impact

An All Too Familiar Tale



High Stakes Interactions

"You never know what a donor is going to throw at you...Fumbling a visit or an ask could mean the loss of a major gift. And we could have been working toward that gift for years."

Anne Melvin, Director of Training and Education, Harvard University

“Today’s Practice is Tomorrow’s Victory”

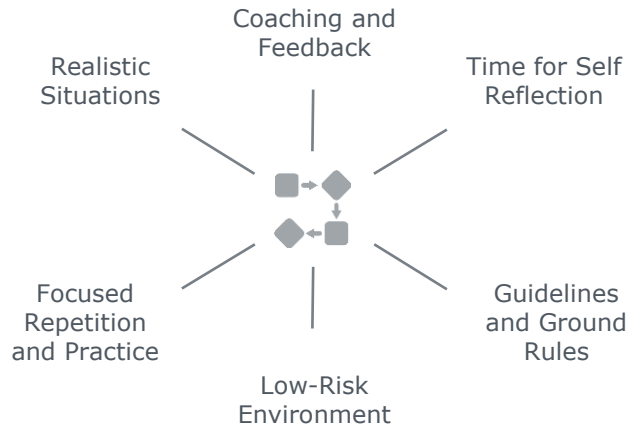
A Prerequisite for Strong Performance

Elements of a Powerful Practice Environment

You Are What You Practice Most

“Practice isn’t the thing you do once you’re good. It’s the thing you do that makes you good.”

*Malcolm Gladwell, Author
Outliers*



Replicating a Tried and True Method

Ithaca College MGOs Use Case Studies to Analyze Scenarios

Case Study Process	 MGO Director sifts through existing scenarios and picks one to two cases	 Respective MGO writes and shares a summary of the case before and at the onset of the session	 MGO Director facilitates constructive group discussion	 Group closes with a pull-up of next steps and lessons learned
Essential Elements	<i>Scenario is general, yet challenging</i>	<i>Summaries provide pertinent details (e.g. prospect background and past giving history)</i>	• Strong facilitator • Inexperienced MGOs prompted to contribute • Relevant follow-up questions provided	<i>Steps are concrete and actionable</i>

High Payoffs for Ithaca

Boosted Confidence Leads to Increased Productivity

More Tools in the Toolbox

“These case study sessions get MGOs to understand that situations can be categorized into themes. Our sessions help MGOs build a toolbox to respond to these themes, and it boosts their confidence. The only way to build the toolbox is to give them real experiences or to get them to discuss other peoples’ experiences and integrate that into their own knowledge.”

*Craig Evans
Director of Major and Planned Giving
Ithaca College*

Heightened Productivity

10x

Increase in proposals since starting the sessions



6:1

Accelerated discovery and qualification

Average ratio of calls needed to secure a visit, compared to a ratio of 10:1 before using case-study sessions

“Can I Get a Replay?”

Professionals Benefit From Seeing Themselves Through the Eyes of Others

Learning Through Video Replays in Sports...

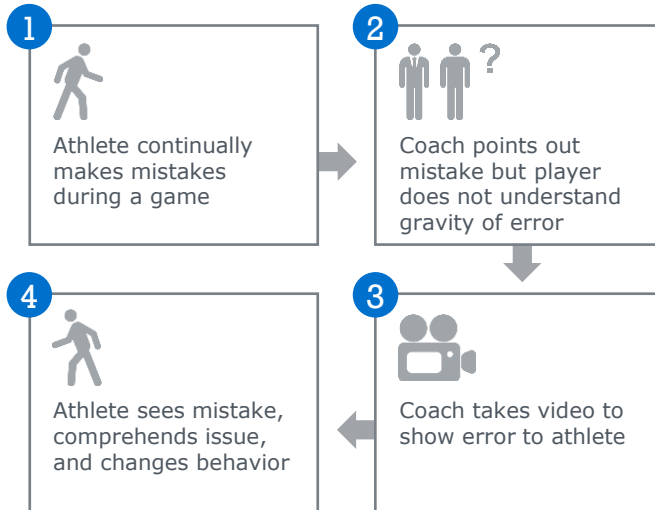
What Matters Most

<35%

Of impact in face-to-face conversations occurs through *verbal* communication

>65%

Of impact in face-to-face conversations occurs through *nonverbal* communication



...And Other Professions

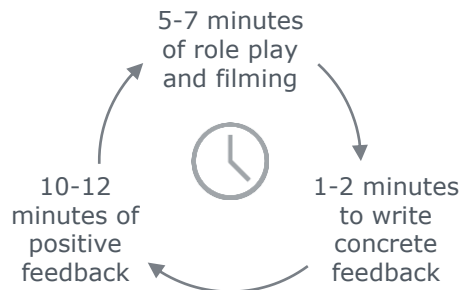
- Medicine
- Music
- Sales
- Acting

Fundraisers Watch Themselves at Work

Harvard's Role Play Allocates Time for Prep, Filming, Viewing, and Feedback

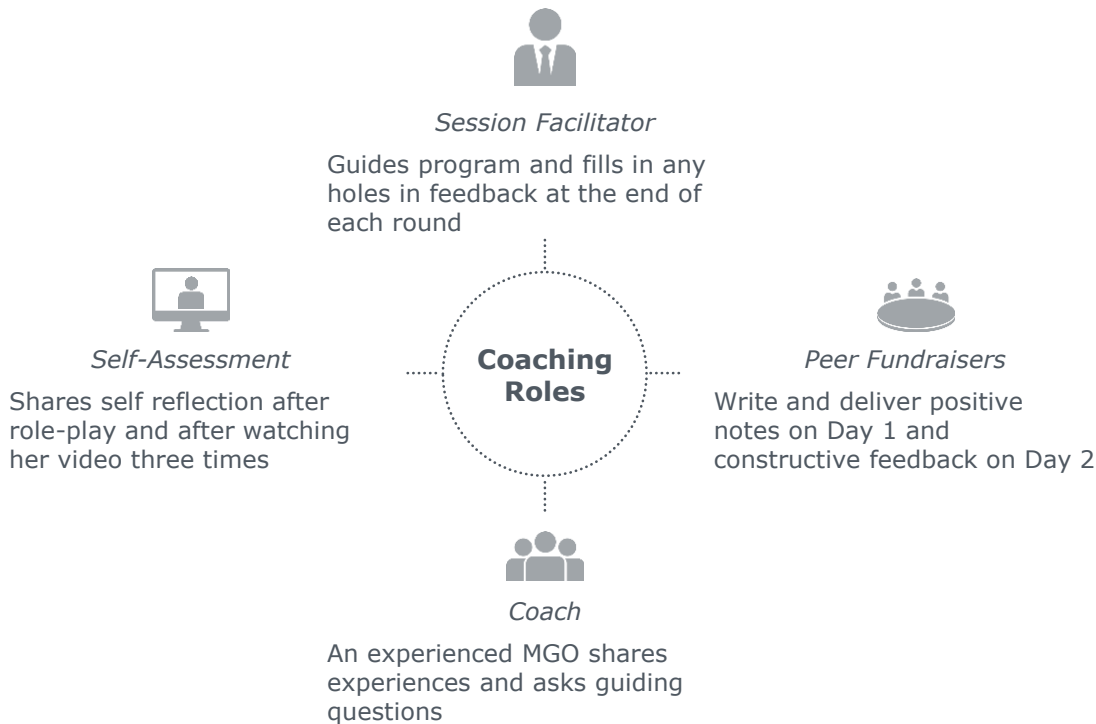
Agenda	
Pre-Work	
N/A	Fundraisers choose from eight scenarios
N/A	Fundraisers and coaches review guide on giving positive feedback only
Day 1 (2 to 3 Hours)	
20 min	Welcome and ground rules
20 min each	Role play and initial positive feedback
Post-session	Fundraisers review their own videos three times
Day 2 (1.5 Hours)	
10 min	Outline of how to give one piece of constructive feedback only
10 min for each gift officer	Individual self-assessment
	Peer feedback
	Facilitator comments
	Positive notes from the group

Role Play by the Minute



Revealing Blind Spots

Four Avenues for Feedback Provide 360° View



Growing Strengths and Minimizing Weaknesses

Participants Leave with an Enhanced Understanding of Performance

Watching Replays...



100%

Of participants found it helpful to watch themselves on film

67%

Of participants would like to be filmed again

...Highlights Behaviors

100%

Of participants identified concrete strengths

89%

Of participants identified tangible areas for improvement

MGOs Identify Multiple Strengths...

"I'm sincere in my conversations with alums and can generate a smooth conversation"

"Calmness, ability to drive and redirect conversation"

"Eye contact, good body language, ability to connect with the donor on a personal level"

...And Each Note One Area for Improvement

"Content and stories. I'm still learning about Harvard and I need to have more compelling support for my case"

"Clear delivery of multifaceted ask and improved process for prioritizing what to ask for"

"Using pivots more to keep conversations on track"

Simulation Based Coaching Toolkit

Now Available for Download on EAB.com



Katie Stratton
Turcotte)
Practice Manager

MORE FROM KATIE

Deploying High-Impact Skill Building)

Talent recruitment and professional development: A zero-sum game?)

Formalizing Professional Development Processes)

Simulation-Based Coaching Toolkit for Fundraisers

Build skills through video replay and group feedback

Toolkit | March 03, 2016

Critical tools to plan and conduct a Simulation-Based Coaching Session aimed to improve frontline fundraiser performance.

This toolkit provides everything you need to lead a two-day simulation-based coaching session with your fundraisers. The toolkit is designed to be used with the [Simulation Based Coaching Scenario Library](#) and the [Day One Introductory Presentation](#).

The toolkit contains guides, templates, talking points, and more. Each tool falls into one of three distinct categories:

- [Preparing for a simulation-based coaching session](#)
- [Facilitating a simulation-based coaching session](#)
- [Self-reflection and feedback forms](#)

Click on each category to learn more about the specific tools. You can either download the full toolkit or each tool individually.

[Download the full toolkit →](#)

Prepare for a simulation-based coaching session

Learn how to lead a simulation-based coaching session at your institution with logistics guides, a preparation checklist and timeline, sample session agendas, and email templates for communicating with attendees.



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11 Implementation Tools

Prepare for a simulation-based coaching session

Learn how to lead a simulation-based coaching session at your institution with logistics guides, a preparation checklist and timeline, sample session agendas, and email templates for communicating with attendees.

[Tool 1: Simulation-Based Coaching Logistics Guide](#)

[Tool 2: Facilitator Preparation Guide](#)

[Tool 3: Introductory Email Template](#)

[Tool 4: Simulation Description and Agenda](#)

[Tool 5: Pre-Work Email Template](#)

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Facilitate the session

Detailed agendas make it easy to conduct the session for any number of fundraisers. Facilitator talking points and introductory slides allow development leaders to confidently introduce the session, describe goals, and set ground rules. Discussion guides ensure that feedback is useful and tailored for each fundraiser.

[Tool 6: Conducting the Session](#)

[Tool 7: Introductory Presentation and Facilitator Talking Points](#)

[Tool 8: Facilitator Discussion Guide](#)

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Structure feedback and self-reflection

Download forms for all participants to assess each fundraiser's performance during the simulation. Self-reflection forms allow participating fundraisers to evaluate their own performance when watching it on video.

[Tool 9: Participating Fundraiser Self-Reflection Form](#)

[Tool 10: Observer Feedback Form](#)

[Tool 11: Coach Feedback Form](#)

Closing the Gap to Reality

Simulations Fix Mistakes in Real-Time

Higher Use of Simulations Among Effective Organizations

Training Industry, Inc.

55%

Of **effective** organizations use simulations for leadership trainings

31%

Of **ineffective** organizations use simulations for leadership trainings

Constant Feedback Leads to Continuous Improvement

“Simulations provide the benefit of constant, consistent and immediate feedback. If the simulation is designed to offer feedback at various points throughout the timeline, participants can take the feedback, make corrections, and move forward.”

Bryant Nelson, Managing Director of OnlineTraining Publication

Interacting with a Virtual Donor

Simulation Replicates Qualification, Visits, and Solicitations

University of Central Florida's Training Avatars

Imitates Preparation

MGOs receive a donor profile, numbers on giving and wealth, and notes on previous interactions with advancement



Allows for Multiple Pathways

Avatar reacts in many ways, resulting in a "choose your own adventure" theme that is tough to anticipate

Creates a Common Scenario

Writers picked a common, yet challenging scenario that includes various points in the donor lifecycle

Maintains Character

Unlike an in-person role-play in which the donor may drop out of character, the avatar stays composed

Raising the Stakes

"This is role-playing on steroids. Traditional role-playing can be so hokey and you are not in the moment. When you are in the simulator, you feel like it's real and you take it seriously."

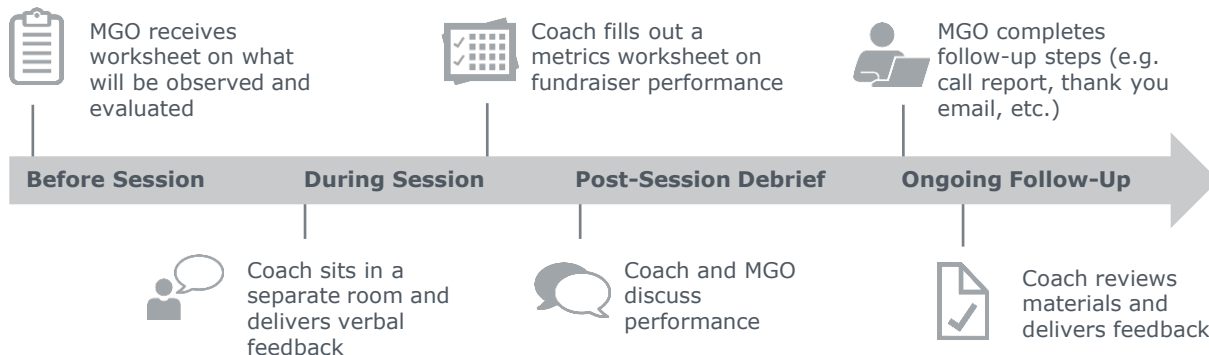
Kara Fleharty Schultz, AVP of Development, University of Central Florida



Creating a Real-Time Feedback Loop

Continuous Coaching and Repetition Hones Skills at UCF

Coaching Touch Points



MGO undergoes simulation three times



Accelerating Time to Peak Performance

Simulator Produces Greater Results in Less Time

Estimated Dollars Raised Per Year by Younger Fundraisers
Before Training Launched

\$250K



Estimated Dollars Raised Per Year by Younger Fundraisers
After Training Launched

\$1M



”

Time Speeds Up

“The nature of the experience is an accelerant to outcomes. Less time is needed for training in the simulator than in real-life...Education studies have shown that 10 minutes in the simulator is equivalent to one-hour in real life.”

*Kara Fleharty Schultz
AVP of Development
University of Central Florida*

Balancing Our Talent Management Focus

Distributing Resources and Intellectual Capital With an Holistic Approach

Four Pillars of Strategic Talent Management Mapped to EAB Resources



Source: The Advancement Forum. EAB interviews and analysis.

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