EAB

The Professional Development Playbook

A Toolkit to Target Skill Building and Maximize Advancement Staff Performance

Advancement Forum

Advancement Forum

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Table of Contents

Supporting Members in Best Practice Implementation

The Advancement Forum's Library for Strategic Talent Management

Over the course of the last two years, the Advancement Forum has dedicated our research to helping advancement leaders with their strategic talent management objectives. From hiring to measuring performance, these resources, along with this toolkit and its related materials, are designed to help you attract the best possible staff, manage their performance, and build strong internal relationships designed to maximize their performance and retention.

Competing for Talent

As institutions rely on major gifts to replace alternative sources of revenue, finding a high-performing major gift officer (MGO) has never been more crucial—and competition for the best MGOs has never been higher. This study examines how institutions can recruit high-performing major gift officers in an environment of increasing demand for top recruits.

Gifted and Talented

This study shares the findings of our analysis of over 1,200 major gifts officers in higher education. We analyzed the attitudes, behaviors, and competencies associated with top performance among major gift officers. The study explores the traits of top performing fundraisers and how to recruit them in an environment of heightened competition.

Making Meaning of Metrics

This study examines how institutions can enhance MGO performance management through the strategic application of metrics. It provides tactics on how to create accountability mechanisms, build incentive structures to guide behavior, and use performance data to influence day-to-day decision making.

Presenting and Promoting Success

Many advancement leaders rely on dashboards to track progress and guide performance. This white paper examines both strategic and managerial dashboards, and provides guidance for selecting appropriate metrics and designs to optimize their utility.

All Advancement Forum resources are available to members in unlimited quantity.

To order additional copies of this book, or to learn about our other services, please visit us at eab.com or contact us at 202-266-6400.

Companion Resources to This Publication

This publication is only the beginning of our work to assist members in better planning and targeting professional development for staff. Recognizing that ideas seldom speak for themselves, our ambition is to work actively with members of the Advancement Forum to decide which practices are most relevant for your organization, to accelerate consensus among key constituencies, and to save implementation time.

For additional information about any of the services below—or for an electronic version of this publication—please visit our website (eab.com).

Formalizing Professional Development Processes

On-demand webconference available on eab.com that walks through the practices for diagnosing skill gaps and instilling accountability for professional development at your organization. Forum experts are also available to conduct private webconferences with your team.

Deploying High-Impact Skill Building

On-demand webconference available on eab.com highlighting practices to help members optimize traditional training, integrate learning into the workflow, and provide practice environments. Forum experts are also available to conduct private webconferences with your team.

Perfecting the First 180 Days

Onboarding Toolkit for Major Gift Officers

A corresponding toolkit for major gift officer managers and talent management executives. It is comprised of templates and tools that can be downloaded and edited. These tools are available for download on our website at eab.com.

Building Skills Through Video Replay and Group Feedback

Simulation-Based Coaching Toolkit for Fundraisers

A do-it-yourself toolkit that provides everything necessary to conduct a simulation-based coaching session with your team. These tools are available for download on our website at eab.com.

Talent Review Launch Guide

A suite of resources that provides necessary resources to introduce staff and managers to their role in a more formalized professional development program. These tools are available for download on our website at eab.com.

Did you know? Our experts regularly visit campuses to lead onsite sessions focused on helping internal project teams select the most relevant practices and determine next steps.

Executive Summary

As this publication was being created, the *Chronicle of Philanthropy* published an article that highlighted how a lack of opportunities for young, ambitious workers to advance is creating frustration and disillusionment with their career prospects.[1] Data collected from the Advancement Forum's study on high-performing major gift officers (MGOs) shows that this isn't just an issue for up-and-coming nonprofit employees, but instead is a perennial problem faced by chief advancement officers (CAOs), especially within the MGO ranks. Of the 1,217 MGOs interviewed in the Gifted and Talented research project, 79% rated professional development as either an important or very important factor in their decision to join their current institution. The hard truth behind this data point is that for many, the professional development offered when they took their present job stops at the end of onboarding. For many MGOs the only opportunity for professional development is perceived to be leaving their current position to take another at a competitor across town or the country for an improved title and a minimal raise.

This toolkit and related resources has been designed to help chief advancement officers and directors of strategic talent management develop and refine their existing professional development programs to ensure that they include three imperatives:

- Training for managers on the importance of their role in the development and retention of their staff, specifically including tools to help build the manger-direct report relationship and to have proactive talent conversations;
- Proactive identification of skill gaps of staff in order to better target professional development offerings;
- High-impact skill building offerings that meet adult learning styles and promote the use of skill development in real time.

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1) Koening R, "Lack of Training for Young Nonprofit Workers Means Too Few Potential Leaders," *Chronicle of Philanthropy*, April 2016, https://philanthropy.com/article/Lack-of-Training-for-Young/236164.

Source: Advancement Forum interviews and analysis.

Elevating Professional Development to a Strategic Priority

- Professional Development Playbook Introduction
- Toolkit Overview
- Audit Resources

Toolkit Overview

Realizing the Return on Our Investment in Frontline Fundraisers

Chief advancement officers rely on frontline fundraisers to meet burgeoning campaign goals and to cultivate and solicit the few major donors who generate the majority of advancement revenue. Today, as institutions embark on the largest campaigns in their histories, many advancement shops find that they need to add staff to their frontline fundraiser ranks. But, while nonprofits often plan six to 12 months in advance for the recruitment of new employees, they often ignore professional development and career growth until it's too late—that is, until they need to fill a role and realize they don't have internal candidates, or until people leave because their growth has stagnated.[1] Not only do CAOs plan further in advance to hire talent, they spend more, allocating roughly $15,000 per new hire[2] compared to approximately $1,200 per employee[3] for professional development within their annual budgets.

Changing the Way We View Professional Development in Advancement

To ensure advancement leaders realize the investments made when hiring new frontline talent, chief advancement officers must reframe the way professional development is viewed in the profession. Not only will this shift impact new hires, but it will also help the institution reinvest in existing staff to improve productivity and, consequentially, impact the retention of staff over time. This necessitates a change in the way professional development is delivered. First, there needs to be a shift away from the one-size-fits all approach of aligning professional development efforts with individual needs, so that professional development is targeted to the specific needs of both individuals and groups. CAOs have to begin to hold themselves, MGO managers, and MGOs accountable for the investments made in professional development. This necessitates treating professional development like any strategic initiative and ensuring its alignment to organizational needs and goals through systematized formal processes. And finally, we must move from a one-and-done approach that fails to take into account adult learning styles. Instead, professional development needs to be aligned with these learning styles to derive maximum value. Creating a holistic professional development program requires building upon continuous learning, practice, and implementation deployed through ongoing, high-impact skill-building.

The Professional Development Playbook is designed to help members elevate professional development to a strategic priority at their institutions. While it focuses predominately on major gift officers, the tools are adaptable for other members of the advancement team.

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1) Kapila M, *The Business Case for Investing in Talent*, Stanford Social Innovation Review, May 7, 2014, http://www.ssireview.org/blog/entry/the_business_case_for_investing_in_talent

2) Includes direct costs of hiring, including staff time for interviewing; excludes opportunity and vacancy costs.

3) Estimated per person budget based on a 1% allocation of overall budget for professional development.

Source: Advancement Forum interviews and analysis.

Toolkit Overview

The toolkit begins with a Strategic Goal and Metric Selection Guide, and tools to help you understand your talent pool. Then, it provides implementation guidance structured around three imperatives: Diagnosing Skill Gaps, Equipping Managers, and Deploying High-Impact Skill-Building. Each imperative contains related steps and a wide range of tools and templates to help implement the Playbook at your organization. To access the Advancement Forum’s full repository of tools and downloadable templates, please visit **eab.com / af / PDPlaybook**.

I. Setting Professional Development Strategy

Strategic Goal and Metric Selection Guide

Understanding Your Talent Pool

II. Implementation Guide

1. **Equip Managers**
2. **Diagnose Skill Gaps**
3. **Deploy High-Impact Skill Building**

Imperative 1: Equip Managers

Traditionally, senior leaders, managers, and fundraisers neglect professional development because it is detached from both organizational and individual goals. Formalizing professional development raises it to a strategic priority and ensures it gets the attention it deserves. At the same time, managers and fundraisers require tools to hold accountable, forward-thinking conversations.

Step 1: Formalize professional development

Step 2: Facilitate talent conversations

Imperative 2: Diagnose Skill Gaps

Since advancement staff possess various levels of experience and skill, the status quo, one-size-fits-all professional development approach wastes time and provides little return. Advancement leaders can target professional development to fundraisers’ wants and needs by understanding the skill gaps and strengths among their fundraiser populations.

Step 3: Establish a list of core skill sets

Step 4: Identify skill gaps and strengths

Step 5: Understand the overall talent pool

Imperative 3: Deploy High-Impact Skill Building

Under traditional training models, fundraisers do not retain or use what they have learned. These trainings are one-and-done, and they fail to fit current understandings of adult learning styles. Refurbishing traditional programs into ongoing and outcomes-oriented models can start to plug knowledge leaks. Integrating learning into workflows takes it one step further by ensuring immediate application of knowledge, while also adapting to fundraisers’ busy schedules. To ensure that fundraisers perform well before they reach high-stakes positions, senior leaders can create powerful practice environments.

Step 6: Optimize traditional training

Step 7: Integrate learning into workflow

Step 8: Provide practice environments

Source: Advancement Forum interviews and analysis.

Setting Professional Development Strategy

Strategic Goal and
Metric Selection Guide

At a time when advancement leaders are being asked to raise more money than ever before, often without the ability to add more MGOs to the team, elevating the performance of staff is more critical than ever. Forum researchers continually heard that only a fraction of the advancement team is performing to their full potential. Refrains of "the need to get more out of your existing staff," and that "even the most seasoned gift officers need to be more productive" were abundant, due increasingly to the need for meeting and exceeding financial goals on a never before seen scale.

To begin to hold the entire organization accountable for the investments we make in professional development, CAOs must begin to treat professional development as a strategic initiative with an equal focus as hiring talent. The elevation of professional development to this level ensures its alignment to organizational needs and goals through systematized formal processes. Based upon your organization's current investments in professional development, you will determine the goal for your program: are you building a new professional development program, or reassessing your existing program to align with the key imperatives of this study?

Tool Name	Description	Pages
Staff Allocation for Young Programs	Determine early assignments for existing staff to help elevate professional development through task force creation	11
Current Professional Development Program Assessment	Use this assessment template to evaluate your existing professional development programming against the imperatives of the Professional Development Playbook	12
Setting Professional Development Program Vision	Based on your institution's goals and resources, map out which imperatives you want to prioritize using this vision document	13
A Guide to Creating Your Strategic Talent Management (STM) Scorecard	An overview of metrics that can be used to set targets and measure the impact of professional development on the institution	14

Source: Advancement Forum interviews and analysis.

PD as an Emerging Strategic Priority

Allocating Staff Resources for a Young STM Program

Instructions: Use the following checklist to determine how to initiate your professional development program, specifically thinking about initial staff resources you can deploy against professional development strategic priorities. In addition, the optional section of this diagnostic can be used to find potential support for a small STM team to augment an existing program.

Required

Yes___ No___ Do you plan to make talent management a long-term strategic priority?

Yes___ No___ Do you lack the resources for a dedicated strategic talent management function?

Yes___ No___ Do you desire input from multiple staff members?

Yes___ No___ Do you have a strong leader in mind to oversee the team? Name: __________________

Yes___ No___ Do staff members have the time to add on *at least* eight additional hours of meetings per year and 10+ hours of work each per year?

If the majority of your answers to the questions above are "yes," create a cross-functional employee team for talent management, until such time as you are ready to invest in a strategic talent management FTE.

Optional

Yes___ No___ Are you looking to create leadership opportunities for staff members?

Yes___ No___ Are you having trouble getting managers to assume full responsibility for directing fundraisers to training opportunities and holding effective professional development conversations?

Yes___ No___ Do managers need substantial training in how to have effective professional development conversations?

Yes___ No___ Do you have staff to oversee the following sub-areas (listed in the chart below)?

If the majority of your answers to the questions above are "yes," consider the leadership of this team as a professional development opportunity in and of itself, using it as a "crucible moment" or stretch role for existing members of the team interested in leading a strategic priority. Use the list below to assign responsibility to staff.

Committee / Sub-area	Name	Name
Recruiting		
Interviewing and hiring		
Orientation and onboarding		
Training and development		
Retention strategies		
Evaluation		

Source: Advancement Forum interviews and analysis.

Assessing Current Professional Development Programs

Recalibrating Focus of Established Programs

Instructions: Use the following checklist to evaluate your existing professional development program against the Professional Development Playbook's key implementation steps. Use your results to determine which parts of the playbook will be of most use to you as you enhance your efforts to build staff competency and productivity.

	Evaluation Criteria						
Current Professional Development Offering	Aligned to Individual Needs	Furthers Institution Goals	Builds Key, Identified Skills	Works with Busy Schedules	Prompts Application of Skills	Embeds Real-time Feedback	Provides Measurable Outcomes
Onboarding	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Mentoring	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Joint Visits	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Conference Attendance	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Internal Training	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No

Source: Advancement Forum interviews and analysis.

Setting Professional Development Program Vision

Instructions: Based on your institution's professional development and skill building goals and available resources, map-out which of the tactics profiled throughout this playbook you would like to prioritize using the chart that follows. Use this vision document to assign program responsibility and next steps.

Tactic	Immediate	Possible for Future	Not Applicable	Staff Assigned	Page
MGO Skills-Based Needs Assessments					
Work Product Review					
Professional Development Conversation Guide					
Career Map and Individual Development Plan					
Flexible Onboarding Matrix					
Outcomes-Oriented Mentoring					
Cohort Learning Communities					
Targeted Joint Visits					
Real-Time Strategy Coaching					
Crucible Roles					
Group Case Studies					
Simulation-Based Coaching					

Source: Advancement Forum interviews and analysis.

A Guide to Creating an STM Scorecard

Selecting Core Metrics to Measure the Impact of Your Program

Overview: Executives increasingly show a preference for a quick, digestible snapshot of progress toward goals. This guide outlines core metrics to evaluate the efforts of your STM program. It is designed for you to select key metrics and to create your scorecard.

Key Considerations

- Measuring success is not only an important part of determining how you will promote your plan for professional development within the advancement division, it also allows you to establish how you will evaluate your efforts.
- Generally, programs that equip managers to hold regular talent conversations (those that go beyond simply discussing performance) have the greatest impact on both performance and retention.

Instructions: To create your scorecard, select the key metrics from the list below that you will start to track on a regular basis.

STM Metrics

Talent Demographics

☐ FTE = full time equivalency of all employees under the advancement umbrella
☐ Male/female ratio
☐ Unit leader male/female ratio
☐ Age
  - Early career (ages 20-35)
  - Mid-career (ages 36-54)
  - Late career (ages 55+)

☐ Minority representation

Talent Retention and Engagement

☐ Retention rate of all advancement staff (compare changes in staff since prior fiscal year; can be broken into key department areas)
☐ Retention rate of top talent (can be broken into key department areas)
☐ Retention of new hires (can be broken into key department areas)
☐ Employee engagement (if tracked by an engagement survey instrument)
☐ Employee performance (review overall performance ratings to look for trends and problem areas)

Talent Acquisition

☐ Time to fill position
☐ Cost to hire
☐ New employee onboarding (tracks number of new employees and transfers who complete the full onboarding checkpoints)
☐ Strategic hires

Talent Development

☐ Programming (courses offered internally)
  - With external presenters
  - With internal presenters

☐ Conference participation
☐ Internal programming satisfaction rates
  - External presenters
  - Internal presenters

Human Resource Excellence

☐ Employee relations issues (number of issues that resulted in coaching, official counseling, and/or write-ups)
☐ Performance management
☐ Internal promotions

Source: Advancement Forum interviews and analysis.

Getting Ahead of Turnover

Understanding Your Talent Pool

All too often, advancement leaders don't invest in professional development until they are at the risk of losing a high-potential or high-performing employee. To decrease the likelihood of undesired turnover, advancement leaders should implement practices that promote professional development and retention. Staff who feel they have a compelling career path, sufficient growth opportunities and training, and are the right fit for the role are less likely to look for jobs externally.

To being prioritizing the retention of staff at the same level as the recruitment of new staff, use the following set of tools to help stay ahead of potential 'turnover hotspots.'

Tool Name	Description	Pages
MGO Turnover Risk Assessment	This assessment uses a series of red flag statements to help assess an individual fundraiser's risk of leaving the institution	16
Departure Impact Scoring Guide	This guide provides qualitative criteria to determine the level of impact an employee's departure will have on advancement's productivity and culture	17
Employee Retention Matrix	This matrix allows managers to map employees by their risk and impact scores to determine which employees may merit a customized retention plan which focuses on professional development; it may also be used to identify turnover patterns and root causes	18

Source: Advancement Forum interviews and analysis.

Fundraiser Turnover Risk Assessment

Assessing the Need to Prioritize Professional Development

Instructions: Managers should complete this assessment for every employee in their department or team on an annual basis. For each employee, consider how much you agree with each statement, ranging from “strongly agree” to “disagree,” and place a check mark in the appropriate box for each statement. Tally the columns, then select the employee’s overall turnover risk based on which column has the most checks. In the event of a tie, managers should make a judgment call on overall risk.

A “strongly agree” for either of the high-risk red flag diagnostic questions automatically qualifies an employee as high risk.

Employee Name: __________________ **Tenure:** _____ **Manager Name:**_________________

High-Risk Diagnostic Questions	**Disagree**	**Somewhat Agree**	**Strongly Agree**
The employee has openly discussed a desire to leave within the next 12 months.			
The employee has a poor working relationship with his/her direct supervisor.			
Standard Risk Assessment Questions			
Background			
The employee has recently experienced life-changing events.			
The employee is at a length of tenure that typically experiences high turnover.			
The employee has mentioned contact from another employer.			
Relationships			
The employee does not communicate openly with his/her direct supervisor.			
The employee has grown indifferent to building relationships with key allies.			
The employee does not have many personal connections to others within the organization.			
Employment Proposition			
The employee expresses frustration with compensation or work-life balance.			
The employee’s job has changed significantly in past 12 to 24 months.			
The employee has not recently received recognition for his/her contributions.			
Behavior			
The employee often seems stressed or tired at work.			
The employee seems overwhelmed with current job duties.			
The employee’s engagement level has noticeably dropped.			

	Disagree	**Somewhat Agree**	**Strongly Agree**
Total			
Overall Turnover Risk (Circle One)	**Low**	**Medium**	**High**

Source: *Fundraiser Talent Management Toolkit: Resources for Achieving Breakthrough Retention and Productivity*, Philanthropy Leadership Council, 2015, p. 9; Advancement Forum interviews and analysis.

Departure Impact Scoring Guide

Understanding Where Turnover Will Hurt the Most

Overview: This tool provides qualitative criteria to determine whether an employee's departure will have a significant impact on department productivity and culture.

Instructions: Managers should assess each employee using the six categories and corresponding criteria described below. Check the box that best fits the employee for each of the six categories. The categories are not necessarily of equal weight—managers should assess "Overall Impact" using the number of "Low," "Medium," and "High" responses as well as their own instinct about the employee.

Employee Name: ________________ **Tenure:** ______________ **Manager Name:** ____________________

Category	Low	Medium	High
Performance	☐ Failed to meet expectations	☐ Meets expectations	☐ Consistently exceeds expectations
Unique Skills	☐ Demonstrates some of the competencies required for position	☐ Demonstrates most of the competencies required for position	☐ Excels at all of the competencies required for position
Replacement Difficulty	☐ Expected replacement time is 30 days or less	☐ Expected replacement time is 31 to 90 days	☐ Expected replacement time is greater than 90 days
Leadership	☐ No interest in activities that do not have a personal impact	☐ Works well with others, contributes to greater department good	☐ Informal leader, team player, and role model
Internal Social Influence	☐ Few or no personal connections at work, departure unlikely to have negative impact	☐ Well liked, departure would have limited ripple effect	☐ Extremely well liked, departure would impact morale
External Relationships	☐ Few relationships with donors, prospects, volunteers, and other community partners	☐ Established relationship in the community with donors, prospects, volunteers, and other community partners	☐ Sole development staff member with relationship with many donors, prospects, volunteers, and other community partners

	Low	**Medium**	**High**
Total			
Overall Impact (Circle One)	**Low**	**Medium**	**High**

Source: *Fundraiser Talent Management Toolkit: Resources for Achieving Breakthrough Retention and Productivity*, Philanthropy Leadership Council, 2015, p. 10; Advancement Forum interviews and analysis.

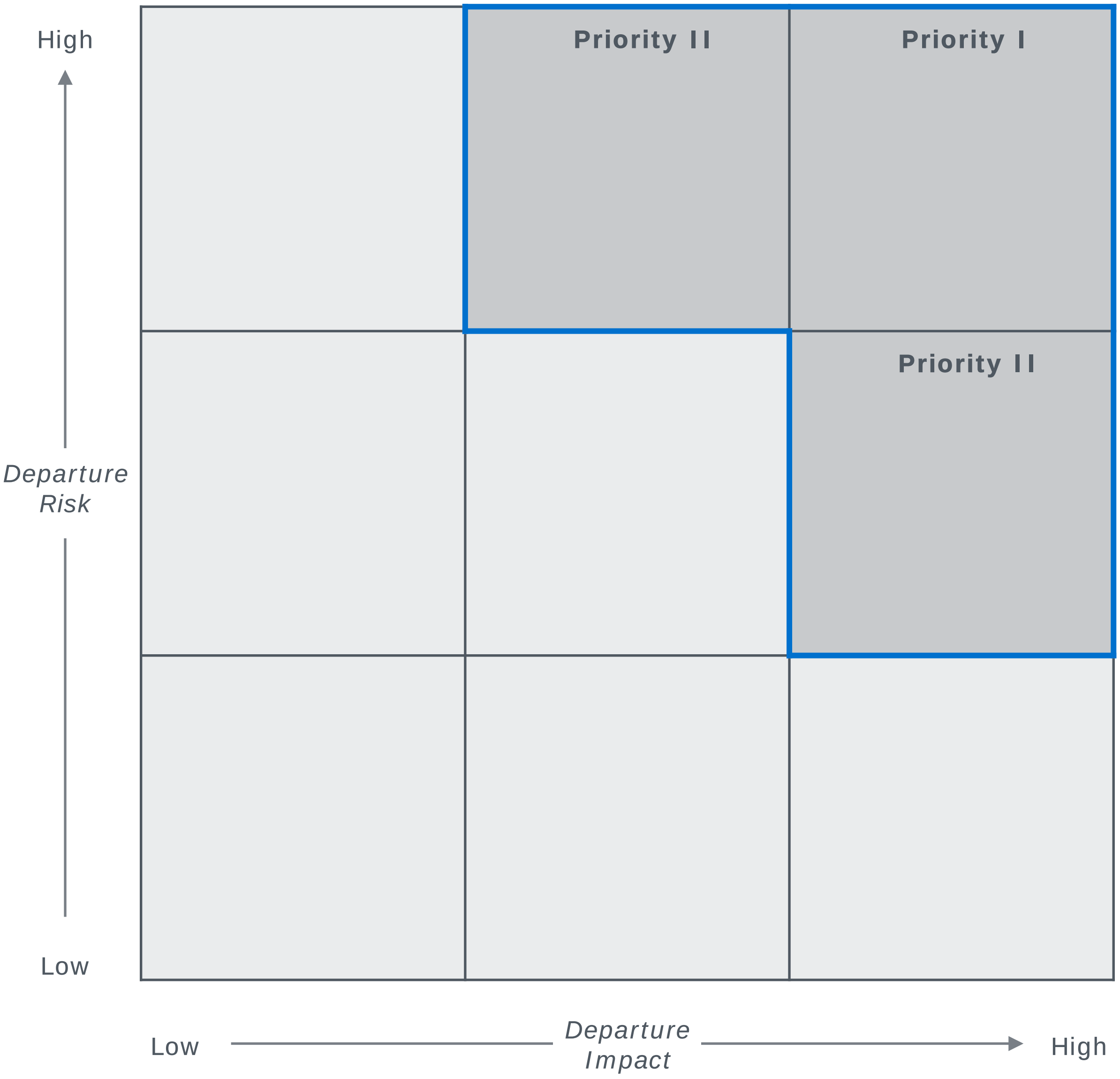
Employee Retention Matrix

Proactive Planning to Use Professional Development as a Tool

Overview: This matrix enables managers and advancement leaders to identify employees with a high retention risk and departure impact.

Instructions: Using the results from the Fundraiser Turnover Risk Assessment and the Departure Impact Scoring Guide, managers should plot employees on the matrix. Individual retention plans should be created for those high-impact, high-risk employees falling in the upper right Priority I box in the matrix. Employees who fall into the two Priority II boxes warrant close attention and customized retention tactics.

Employee Prioritization Matrix



Source: *Fundraiser Talent Management Toolkit: Resources for Achieving Breakthrough Retention and Productivity*, Philanthropy Leadership Council, 2015, p. 11; Advancement Forum interviews and analysis.

EAB

Equip Managers

IMPERATIVE

1

- Step 1: Formalize Professional Development
- Step 2: Facilitate Talent Conversations

Step 1: Formalize Professional Development

Equip Managers | Diagnose Skill Gaps | Deploy High-Impact Skill Building

Step 1

Creating Space for the Regular Discussion of Professional Development

To turn the tide and increase the performance of advancement teams and consequentially retain staff (even if only for a year or two more), CAOs must elevate professional development to a strategic priority. Over the last several years, EAB has seen institutions making this shift, allocating resources for strategic talent management positions and programs, and beginning to "treat employees the way we treat our alumni and donors."

The foundation of a talent management program is educating leaders that talent management is the responsibility of everyone who manages staff. Ultimately, ongoing conversations about not only employee performance but also career aspirations and professional development must communicate that employees are valued as individuals within the organization. The first step in moving beyond the signal value of offering professional development opportunities is to set aside time for focused conversations between managers and direct reports. This section of the toolkit is designed to help STM professionals and CAOs determine whether those conversations should be embedded in the existing performance review or in a separate talent review process.

Tool Name	Description	Pages
Strategic Decision Guide	This guide provides options to help formalize professional development conversations	21
Talent Review Launch Guide	An agenda, timeline, and tools to support the elevation of professional development	22

Source: Advancement Forum interviews and analysis.

Determine Your Approach to Accountability

Ensuring Talent Conversations Between Manager and Direct Reports Occur Annually

Instructions: Based on your institution's culture and structure, record whether you agree or disagree with the statements below to help determine how you will ensure that managers hold annual talent conversations with direct reports.

Diagnostic Questions	Agree	Disagree
1. My managers don't have time to add another process.		
2. Professional development and past performance can unequivocally be given equal air time in a combined process.		
3. It's impossible to have a full talent and performance conversation without placing both past execution on metrics and future execution of professional development side-by-side.		
4. Past performance is always an indicator of what an individual can achieve in their future performance.		
5. Execution of professional development—and plans for future professional development—are explicit parts of the formal evaluation process. We would never be able to separate the two.		
6. Employees should not be placed in the driver's seat of their careers.		
TOTAL		

Embed in existing performance review process

Create a separate process

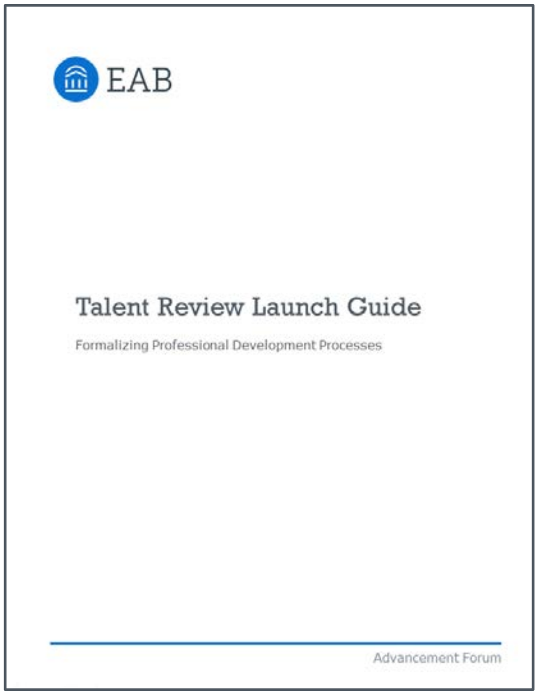
Source: Advancement Forum interviews and analysis.

The Talent Review Launch Guide

Introducing Your Approach to Talent Conversations

Talent Review Launch Guide in Brief

Regardless of the approach you wish to take, staff participating in these conversations for the first time need to be supported. The Talent Review Launch Guide contains resources for strategic talent management staff or chief advancement officers to introduce and support the talent review process.



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Talent Review Launch Guide

Formalizing Professional Development Processes

Advancement Forum

Talent Review Launch Guide Contents

- Talent Review Logistics
- Talent Review Communication Tactics
- Facilitator Preparation
- Facilitator Discussion Guide
- Introductory, Editable PowerPoint Presentation
- Exercise Scenarios and Instructions

Placing a greater focus on talent conversations means that managers and their direct reports will need to gain a greater understanding of the rationale behind the move. This launch guide will help STM professionals and CAOs outline the new expectations of the process, tailored to your organization’s needs. It contains logistical guidance as well as an introductory PowerPoint and experiential exercises to help launch the process, helping ensure that “ownership of professional development between fundraisers and managers is 50/50.”[1]

Download the Talent Review Launch Guide at **eab.com**

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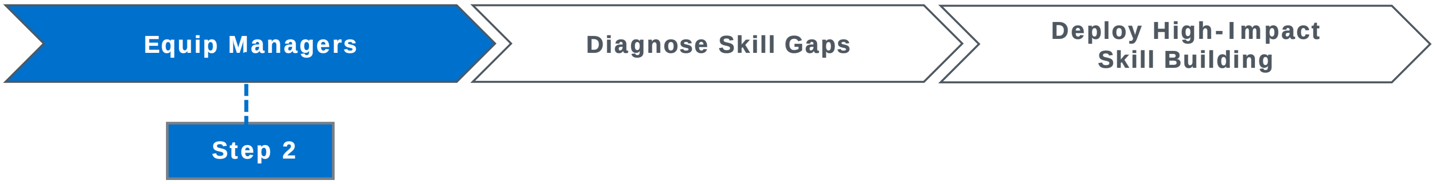
1) Jon Derek Croteau, Ed.D., Executive Director, Alumni Relations and Development, Northwestern University.

Source: Advancement Forum interviews and analysis.

Step 2: Facilitate Talent Conversations



“People Don’t Leave Organizations, They Leave Their Mangers”

Regardless of your ability to allocate resources to strategic talent management programs, there is a critical, yet often-overlooked component of professional development. Organizations that want to move beyond the signal value of offering professional development have to recognize that managers are the lynchpin for employee development and retention. And yet, in the fundraising industry, the path to promotion is to be a great fundraiser. For this reason alone, many managers lack core management skills. In fact, fewer than 10% of CAOs and AVPs attending the 2015-2016 Advancement Forum Meeting Series ever had training prior to assuming their first management role.[1] And our members are not alone: in the fundraising industry, well over half of fundraising directors share this sentiment.[2] So, tools to help hold effective conversations with direct reports are critically important to help orient managers to their roles supporting professional development and executing on key directives.

Step two is designed to help managers begin to hold focused talent conversations with their direct reports with two aims: conveying that the individual is important to the organization achieving its overall goals, and showing that they have opportunities to grow within their current organization, even without a formal career ladder. Perhaps, even more importantly, the tools help managers assess the “application of concepts learned during training and the degree to which targeted outcomes occur as a result of the training event.”[3]

Tool Name	Description	Pages
Talent Review Critical Conversation Guide	Arm managers with these talking points to conduct a talent review conversation with direct reports	24-25
Talent Review Template	Managers will use this document to record the details from talent review conversations	26-27
Career Map Template	Managers and direct reports will use this document to make career aspirations transparent and to map planned professional development to a timeline and achievement metrics	28

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1) Meeting participants were asked: “how many of you received training before assuming your first management job?”
2) 57% of fundraising directors share this sentiment.
3) Levels three and four of Kirkpatrick’s Model of Evaluation, “The Kirkpatrick Model,” Kirkpatrick Partners http://www.kirpatrickpartners.com/OurPhilosophy/TheKirkpatrickModel

Source: Burke, P. “Too Busy Leading to Learn How to Lead,” March 21, 2014, http://www.cygnusresearch.com/burkesblog.donorc-centered-leadership/leadership-training-723/; Advancement Forum interviews and analysis.

Talent Review Critical Conversation Guide

Creating a Vehicle for Focused Manager Conversations

Instructions: Talent review is an opportunity for managers to hold focused conversations with their direct reports as it relates to their work experience and career aspirations. This conversation guide is designed to aid you as you conduct talent review conversations with your team. A copy of the Talent Review Template is available on p. 26 and should be completed across the course of your conversation.

1. Professional Background and Career Progression:

- Talk to me about your education. Where did you earn your undergraduate/graduate degree? What was your major?
- Walk me through (or remind me about) your professional background and career.
- Why did you choose to come to the university or college?
- Why did you choose to work with this advancement team?

2. Current Responsibilities, Position, and Competencies:

Likes

- What does the employee like about their position/unit/organization right now?
- What met their expectations and what did not?
- What do you like about our location (city, state)?
- What do you like about the university or college?
- What do you like about the advancement shop here?
- What do you like about your department or role?

Strengths

- What current knowledge, skills, and abilities does the employee possesses?
- Do they feel they are able to utilize their strengths in their current role?
- I see your strengths as ____. Do you agree with my assessment?
- What other strengths assist you in doing your job well?
- Do you have any unique skills that add value to your department?
- Are there any additional strengths you would like to add to this list?

Challenges

- What are the challenges the employee faces in their position?
- In their unit?
- In the organization?
- Is there any process/procedure in place that makes your day-to-day job difficult?
- What are other roadblocks, if any, that you face?
- Is there anything that can be done more efficiently in your department? Within our shop?

Source: University of Florida, Gainesville, FL;
Advancement Forum interviews and analysis.

Talent Review Critical Conversation Guide

3. **Leadership:**
    - Preferred leadership or supervision style
    - Everyone likes to be managed differently. What leadership style works best for you?
    - How can I as a leader best support you?
    - Is there anything else I can improve upon to better support you?

4. **Future Responsibilities, Positions, and Competencies:**
    - What is the employee's one-, five-, and 10-year goal, aspiration, or interest?
    - What does this employee need to enhance engagement (job satisfaction and commitment)?
    - What do you believe the next steps in your career path will be?
    - Where do you see yourself in one year, five years, 10 years?
    - What about your goal, job or a future role appeals to you?
    - What would increase your commitment to working with the advancement shop here at the university or college?
    - What would enhance your engagement in your day-to-day work?
    - What could we change to make your job more enjoyable?

5. **Areas for Professional Growth:**
    - Where does the employee or their supervisor see a gap in skills or ability?
    - What skills do you think you need to develop in order to achieve the your desired next steps, which we just discussed?
    - Here are some skills I'd like to see you work on across the next year: ________________________________. Would you agree?
    - What skills, training opportunities, or exposure would you like to master, and that would give you the opportunity to pursue your long-term goals?
    - Do you feel you are missing any degrees or certifications that would help you be successful?
    - Preferred method for professional development (experiential, mentoring, classroom training, reading about best practice, a combination of the above)?
    - What is the most effective way for you to learn a new skill?
    - In which educational opportunities would you like to participate?

6. **Action Items:**
    - Changes to working conditions, alignment, compensation, or structure with timeframes for implementation. *Action items will be identified across the full conversation. It is important to review this section with the employee before ending the conversation to make sure you are on the same page.*
    - Examples of Action Items:
        - ✓ Send to conference to learn more about gift planning
        - ✓ Assign a formal mentor
        - ✓ Evaluate structure and hire additional support staff if warranted

Source: University of Florida, Gainesville, FL;
Advancement Forum interviews and analysis.

Talent Review Template

A Tool for Focused Career Conversations

Instructions: At the conclusion of each talent review conversation with their direct reports, managers should complete this document. Designed to capture the pertinent information from these talent review conversations, it should be sent to the direct report for review and finalization after its completion, including clarifying any discrepancies and making edits that both parties agree upon.

Employee Name: _______________________ **Manager Name:** ________________________

1. Professional Background and Career Progression:

____

____

____

2. Current Responsibilities / Position / Competencies:

Likes

- What does the employee like about their position/unit/organization right now?
- What met expectations and what did not?

____

____

____

Strengths

- What current knowledge, skills ,and abilities does the employee possesses?
- Do they feel they are able to utilize their strengths in their current role?

____

____

____

Challenges

- What are the challenges the employee faces in their position?
- In their unit?
- In the organization?

____

____

____

Source: University of Florida, Gainesville, FL;
Advancement Forum interviews and analysis.

Talent Review Template (Cont.)

3. Leadership:

- Preferred leadership or supervision style:

____

____

____

4. Future Responsibilities / Position / Competencies:

- What is the employee’s one-, five-, and 10-year goal, aspiration, or interest?
- What does this employee need to enhance engagement (job satisfaction and commitment)?

____

____

____

5. Areas for Professional Growth:

- Where does the employee/supervisor see a gap in skills or ability?
- What is the employee’s preferred method for professional development (experiential, mentoring, classroom training, reading about best practice, a combination of the above)?

____

____

____

6. Action Items:

- Changes to working conditions, alignment, compensation or structure with timeframes for implementation:

____

____

____

Source: University of Florida, Gainesville, FL;
Advancement Forum interviews and analysis.

Career Map Template

Co-authoring a Plan to Achieve Career Aspirations

Instructions: Following the talent review conversation, the employee and manager collaborate to outline professional goals with a timeline of three to five years. To support those goals in the near term, they also create an individual development plan for the coming year. The individual development plan should be revisited semi-annually and regularly updated during check-ins on progress throughout the year.

Employee Name: ____

Professional Goals

	Personal Development Objectives	Actions	Timeline	Resources / Support	Metrics
	What are the two or three areas of development you want to focus on in the next 12 months?	For each stated development objective, which specific actions can you take that will help you achieve your goal?	What is your timeline for completing each action?	What training, mentoring, or tools will help you to achieve this plan?	For each of the actions outlined, what will be the standard for success?
#1					
#2					
#3					
#4					

Source: University of Florida, Gainesville, FL; Education Advisory Board; Advancement Forum interviews and analysis.

Diagnose Skill Gaps

IMPERATIVE

2

- Step 3: Establish Core Skill Sets
- Step 4: Identify Skill Gaps and Strengths
- Step 5: Understand the Overall Talent Pool

Step 3: Establish Core Skill Sets

Equip Managers

Diagnose Skill Gaps

Deploy High-Impact Skill Building

Step 3

Across this research, we continually heard that professional development was often applied like “spaghetti on a wall,” where multiple opportunities for professional development are offered to staff with the hope that “something sticks.” To better target professional development efforts at your institution and make better use of your investment in this area, it is increasingly important to isolate the critical skills for the proficient execution of any job function.

The tools that support step three are designed to help your leadership team isolate the key skills which your MGOs (and other functional area positions) need in order to excel in their positions and contribute to the organization.

Tool Name	Description	Pages
Major Gift Officer Skill Set Picklist	A list of CAO- and MGO-manager-identified skills necessary for major gift officer success	31
Skill Set Generation Session Agenda	Editable agenda and introduction and overview to use in scheduling the session	32
Skill Set Generation Session Facilitator Notes	A logistical guide and annotated agenda to facilitate a Skill Set Generation Session	33

Source: Advancement Forum interviews and analysis.

Major Gift Officer Skill Set Picklist

The Advancement Forum developed this list through conversations with CAOs, MGO managers, and strategic talent management leaders. While not exhaustive, it provides a starter picklist of major gift officer skillsets, which can be modified to fit the skill needs of MGOs at your institution.

Instructions: Use this picklist to isolate, refine, and add key skills for MGOs to be proficient in at your organization. Use the blank boxes to add additional skills to each functional area.

Functional Area	Skills	
Prospect Management	☐ Discovery calls/cold calling ☐ Qualitative data collection ☐ Business writing ☐ Relationship building ☐ Cultivation ☐ Moves management ☐ Strategy development	☐ Creative thinking ☐ Communication skills ☐ Listening ☐ Persuasive communication (written and oral) ☐ ☐ ☐
Making the Ask	☐ Strategy execution ☐ Case development ☐ Proposal writing ☐ Storytelling ☐ Financial acumen ☐ Quantitative data collection, analysis, and synthesis	☐ Visit pacing ☐ Making the Ask ☐ Negotiation ☐ Closing a deal ☐ ☐ ☐
Problem Solving	☐ Managing multiple personalities and priorities ☐ Creative thinking ☐ Mediation	☐ Information distillation – understanding complex issues and big problems ☐ ☐ ☐
Self-Management	☐ Time management ☐ Entrepreneurialism ☐ Professionalism ☐ Collaboration	☐ ☐ ☐

Source: Advancement Forum interviews and analysis.

Skill Set Generation Session Agenda

Facilitating a Session to Isolate or Identify Key Skills for Advancement Teams

Instructions: Use the following description to explain the skillset generation session to participants in invitation outreach and to lay out a timeline for this one-hour session.

Major Gift Officer Skill Set Generation Session Description

The Skillset Generation Session is a facilitated brainstorming session developed by the Advancement Forum. This one-hour session will help our team identify and isolate the key skills necessary for major gift officer success so that we can develop an MGO Self-Assessment (attached) that will be used to identify training needs and identify internal resources for the creation of our professional development curriculum. This will, in turn, allow the training we provide to meet both the needs of our overall advancement team, as well as meet the needs of individuals.

Rather than being focused on broad competencies (e.g. behavior and linguistic flexibility, intellectual and social curiosity, information distillation, and strategic solicitation) this session will be focused on isolated skills that, most importantly, can be taught or developed. I'm including a link to the Advancement Forum's *Gifted and Talented* research briefing, the pre-work for this session. During the session, we will use the MGO Skillset Picklist created by the Advancement Forum (attached) to determine the key skills that we feel are most important for our gift officers to cultivate through training.

Key Definitions to Remember

Skill:

An ability and capacity acquired through deliberate, systematic, and sustained effort to smoothly and adaptively carry-out complex activities or job functions involving ideas (cognitive skills), things (technical skills), and/or people (interpersonal skills).[1] The "what" of an individual's performance that makes them good at what they do.

Competency:

A cluster of related abilities, commitments, knowledge, and skills that enable a person to act effectively in a job or situation.[1] The "how" of an individual's performance that makes them good at what they do.

Major Gift Officer Skill Set Generation Session Agenda	Suggested Timeline
I. Introduction to the difference between skill and competency	5 minutes
II. Review of the Major Gift Officer Skill Set Picklist	5 minutes
III. Adding to & pruning the list	10 minutes
IV. Sharing and pressure-testing additions to the list	20 minutes
V. Creation of MGO-Self Assessment(s)	10 minutes
VI. Concluding remarks and next steps	10 minutes

***Note:** This session can also be used to brainstorm a list of pertinent skills for other functional job areas.*

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1) Definitions attributed to talentalign.com; see more at: http://www.talentalign.com/skills-vs-competencies-whats-the-difference/#sthash.Jx1NX8R6.dpuf

Source: Advancement Forum interviews and analysis.

Skill Set Generation Session Facilitator Notes

The Nuts and Bolts of Running the Meeting

Instructions: Use the following logistical information and annotated agenda to facilitate this one-hour session.

Materials List:

- Major Gift Officer Interest Map Template
- Flip chart or whiteboard
- Markers
- Pens and paper for participants

Step		Approximate Time Required
1.	Introduce the difference between skills and competencies: Set-up the room so that the definitions of skill and competency provided at the outset are available to all participants (either on a piece of paper at each seat and/or written on flip chart or the whiteboard in the meeting space). Also include the Major Gift Officer Interest Map Template at each seat. Kick-off the session by walking through these definitions and using the Interest Map to orient the team to the goals for the session. Discuss any questions. Continue to reference the definitions across the session.	5 minutes
2.	Open the Major Gift Officer Interest Map Template and review the Major Gift Officer Skillset Picklist: Ask team members to take five minutes to review the list and begin to think about any additions or deletions they would want to suggest as you move into the next section.	5 minutes
3.	Adding and Pruning the List: Ask team members to work individually or to discuss in pairs each of skills on the list, and their recommendations for additions or deletions from the list that will eventually provided to MGOs to use for the self-assessment.	10 minutes
4.	Sharing and Pressure Testing Team-Generated Additions: Ask each of the individuals or pairs to share any additions to the Skills Picklist. Write additions to the list on the flip chart or whiteboard, and instruct team members to add them to their list as you go.	15 – 20 minutes
5.	Creation of the Self-Assessment: Determine (especially for larger groups) if you want to focus on one set of MGO staff—entry level development associates vs. development directors vs. senior directors—and work to select the 20-25 key skills you want to have each group assess about themselves on the self-assessment.	15 – 20 minutes
6.	Closing Remarks and Next Steps: Thank attendees for their participation in the session. Outline when the self-assessments will be made available for them to distribute to their direct reports.	5 minutes

Key Definitions to Remember

Skill:

An ability and capacity acquired through deliberate, systematic, and sustained effort to smoothly and adaptively carry-out complex activities or job functions involving ideas (cognitive skills), things (technical skills), and/or people (interpersonal skills).[1] The “what” of an individual’s performance that makes them good at what they do.

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A cluster of related abilities, commitments, knowledge, and skills that enable a person to act effectively in a job or situation.[1] The “how” of an individual’s performance that makes them good at what they do.

1) Definitions attributed to talentalign.com; see more at: http://www.talentalign.com/skills-vs-competencies-whats-the-difference/#sthash.Jx1NX8R6.dpuf

Source: Advancement Forum interviews and analysis.

Step 4: Identify Skill Gaps and Strengths

Equip Managers

Diagnose Skill Gaps

Deploy High-Impact Skill Building

Step 4

After isolating the necessary skills for MGO success (and for success in other functional areas of advancement), it then becomes incumbent upon advancement leadership to create guidelines for the diagnosis of skill gaps among the team. There are multiple potential avenues for undertaking this step, beginning with information gleaned during talent review conversations held one-on-one by managers. In fact, the Forum has seen a number of institutions using a variety of methods to diagnose training needs.

Beyond the talent review conversation, an opportunity for self-assessment or a more formal survey of staff can be used to identify key skills in need of development. And finally, an assessment centered on work already being produced on-the-job creates an additional avenue for feedback on skill development needs, with examples of either skill strengths or opportunities for growth. Regardless of the method or methods employed, the proactive diagnosis of skill gaps will help ensure that you realize the return on the investment you're making in professional development.

The tools in this section are designed to help managers and STM leaders pinpoint the training needs of individuals and facilitate the creation of a curriculum that meets individual and institutional needs.

Tool Name	Description	Pages
Major Gift Officer Interest Map Template	A self-diagnosis tool for managers to ask direct reports to complete, mapping select skills against ability	35
Skill-Based Needs Assessment	A list of questions to build your survey tool in order to pinpoint individual and team skill gaps	36-37
Work Product Review: A Guide for Managers	A checklist and red-flag assessment guide to assist managers as they begin to implement work product reviews	38

Source: Advancement Forum interviews and analysis.

Major Gift Officer Interest Map Template

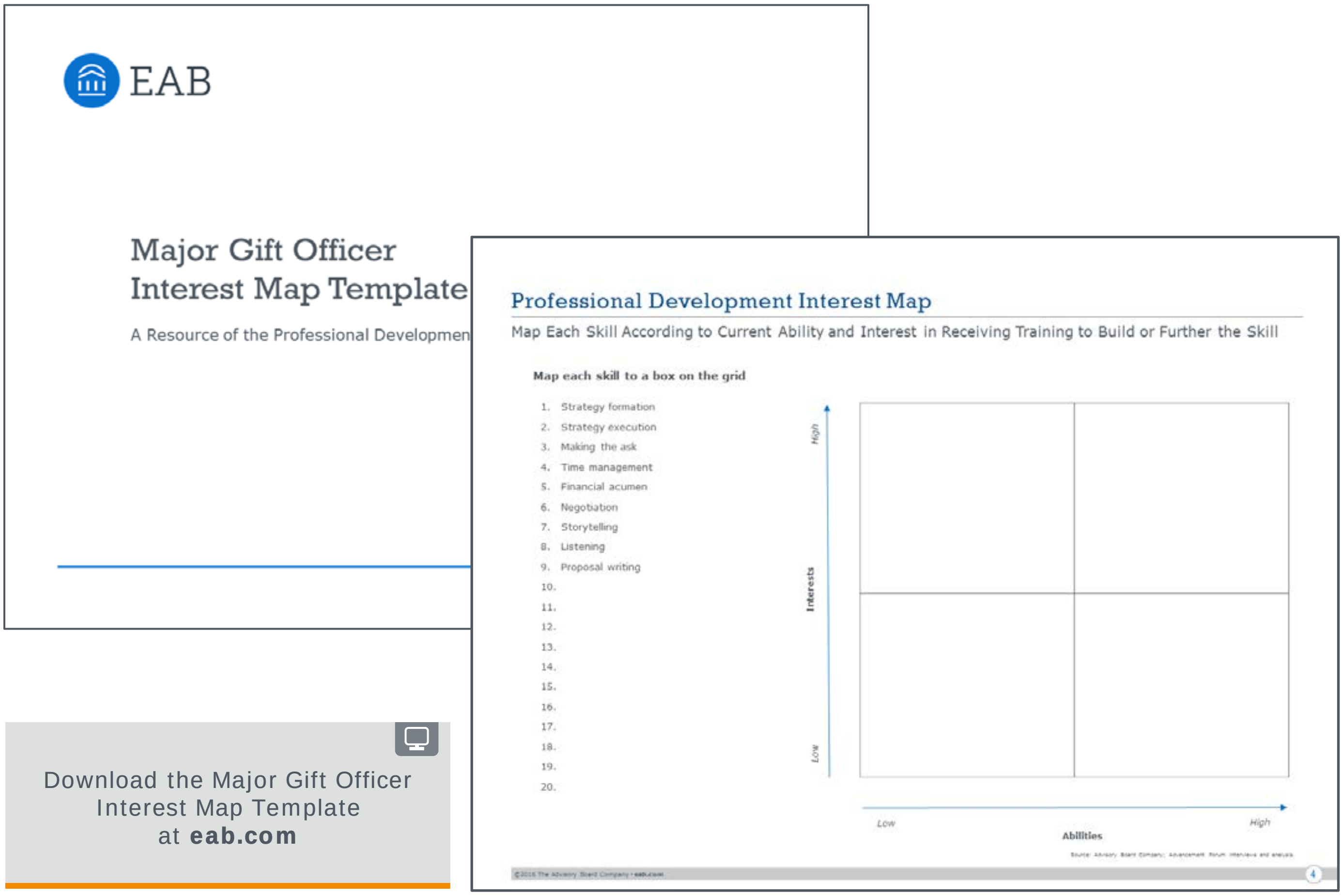
Major Gift Officer Self-Assessment in Brief

Instructions: Download and use the Major Gift Officer Interest Map Template as a handout during your Major Gift Officer Skillset Generation Session. Once the session is complete, format the Interest Map to reflect the skills you want to isolate for MGOs to conduct a self-assessment.

Create a plan for the use, distribution, and completion of the Professional Development Interest Map. Collect the data generated by each individual MGO and use it to identify opportunities for group training, to build your professional development curriculum, and/or to design an individual training plan for each individual major gift officer.

Note: For more tenured or high-performing MGOs, you may wish to adjust the selected skills that appear on the interest map. Alternative uses for the interest map could include different skills for this group—potentially management or leadership skill building. The same skillset list can also be administered with one change in the instructions—mapping each skill according to current ability and *interest in leading training* to support the skill development of your colleagues and the industry.

Additionally, different working groups within advancement could build their own skillset list for their particular functional area.



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Major Gift Officer
Interest Map Template

A Resource of the Professional Developmen

Professional Development Interest Map

Map Each Skill According to Current Ability and Interest in Receiving Training to Build or Further the Skill

Map each skill to a box on the grid

1. Strategy formation
2. Strategy execution
3. Making the ask
4. Time management
5. Financial acumen
6. Negotiation
7. Storytelling
8. Listening
9. Proposal writing
10.
11.
12.
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18.
19.
20.

Download the Major Gift Officer
Interest Map Template
at **eab.com**

Source: Advisory Board Company; Advancement Forum interviews and analysis.

Skill-Based Needs Assessment Question Picklist

Assessing Professional Development Needs

Discover what fundraisers are looking for from professional development, what skills they feel most confident about, and what challenges they face by requesting them to fill out a professional development survey/questionnaire.

Instructions: Complete the questions below reflecting on both your past work and looking toward the future. This questionnaire will be reviewed by your manager and used to help collaboratively create an individualized professional development plan.

Employee Name: ____________________________
Manager's Name: ___________________________

1. What are you most proud of accomplishing in your individual performance in the past year?

2. What are you most proud of accomplishing in collaboration or with your team this year?

3. How do you feel you have contributed to building a high-performing, accountable, and sustainable culture for the university advancement team?

4. What was the greatest professional challenge you overcame this year? What did you learn from that experience and how does it make you a better development professional?

Source: Advancement Forum interviews and analysis.

Skill-Based Needs Assessment Question Picklist

5. What are your professional development goals for the coming year? Please be specific about skills you would like to enhance and opportunities you believe would help grow your development knowledge and leadership.

6. How can management assist you in reaching these goals?

7. What additional resources do you believe will help you be successful?

8. What hurdle is most important for you to overcome in the coming year to aid your success?

9. Is there anything else you would like to share about your performance the past year, and/or how leadership can help assist with your professional aspirations and satisfaction at this University/College?

Source: Advancement Forum interviews and analysis.

Work Product Review: A Guide for Managers

Assessing Skill Strengths and Gaps

Advancement leaders can reveal skill gaps among fundraisers by analyzing work products that are core to fundraisers' jobs. The following audit provides examples of work products, the skill gaps they can reveal, and the corresponding elements to analyze.

Instructions: Use the Work Product Checklist below to identify additional work products that can be reviewed to help assess skill strengths and professional development needs. Share the Work Product Review Guide with managers to create a shared set of criteria by which each work product is evaluated. One column is left blank to add additional work product and evaluation elements.

Work Product Checklist

☐ *Core to Central Strategy*
Advancement leaders choose work products that test and highlight common and important skills

☐ *Produced On the Job*
Work products do not add to existing workloads and they provide consistency for evaluation

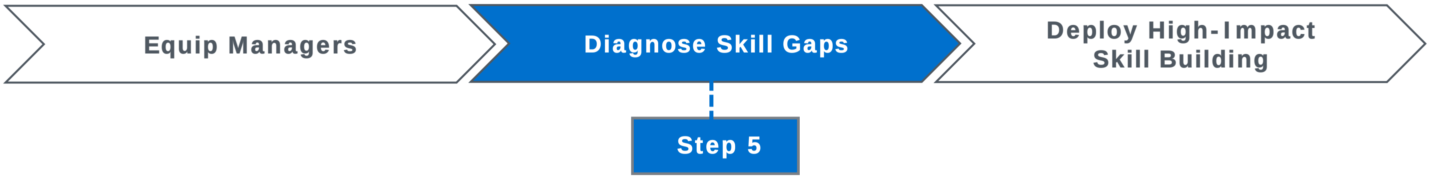
☐ *Provides Feedback Avenues*
Managers can easily point to problem areas on work products and suggest ideas for improvement

Work Product Review Guide

Contact Reports	Foundation Proposals	Prospect Portfolios	Annual Plans
Elements to Evaluate			
Timeliness of report	Clarity of vision	Percentage of prospects at each stage	Quality of discussion on portfolio
Quality of the interaction	Creation of a narrative	Average amount of time that prospects remain at each stage	Metrics used to measure portfolio growth
Depth of description	Ability to identify key partners within the university/college	Overall prospect movement	Ability to articulate financial goals
Thoroughness of information	Writing is clear and concise	Stage where prospects most often stagnate	Ability to identify prospects ready to be solicited within the next 12 months
Prospect or donor movement	Appropriate language is used to convey the case for support	Proposed ask amounts and time to solicitation	Clarity of writing
Next steps clearly outlined	The ask is clear and not buried	Missed steps and their impact on prospect movement	Next steps clearly outlined

Source: Advancement Forum interviews and analysis.

Step 5: Understand the Overall Talent Pool



Equip Managers

Diagnose Skill Gaps

Deploy High-Impact Skill Building

Step 5

As advancement and STM leaders develop an understanding of the needs of individual contributors, the data created through these processes can help provide added insight into the talent pool. These insights can include specifically pinpointing areas of greatest need for training, creating individual development plans, and (perhaps most importantly) identifying high-performing team members whose knowledge and skill should be harnessed in order to develop others within the advancement team and the institution.

The tools in this section are designed to help advancement leaders prioritize key areas of need, and identify internal resources who can help contribute to curriculum development and/or step into crucible roles to further professional development and other strategic initiatives within advancement.

Tool Name	Description	Pages
Talent and Training Prioritization Matrix	Use this two-part prioritization matrix to create a visual overview of the talent pool by mapping individuals according to their potential and current performance; a suggested rating scale is included	40-42
Training Leaders Worksheet	Create a list of individuals who can lead future training in key skill areas and/or should be identified as potential crucible role candidates or in succession planning conversations	43

Source: Advancement Forum interviews and analysis.

Talent and Training Prioritization Matrix

Part I: Assessing Performance Through Key Dimensions

Instructions: Evaluate the performance of current staff using a selection of dimensions outside of, but linked to, the institution's performance review. The rating scale of 1-5 is outlined at the top of the next page. Additional dimensions can be added and existing dimensions removed as needed by the institution. The average of the assessed dimensions becomes the overall performance score, and can be used to start the process of talent mapping shown on page 42.

Name: ____ **Start Date / Years in Seat:** __________________

Dimension	Definition	Assigned Value
Excellence	Degree to which work has been accomplished with required accuracy, thoroughness, and completeness	
Output	How the volume of work completed compares with what is reasonably expected	
Problem Solving	Degree to which team member has found solutions to obstacles encountered in completing assignments	
Teamwork	Degree to which team member has maintained an effective level of communication, civility, and teamwork with coworkers to maximize the attainment of goals	
Collaboration	Degree to which the team member has acted as a community builder and has established good working relationships with colleagues across the college/university	
Leadership	The degree to which team member has provided guidance and direction for the growth and development of peers and/or subordinates	
Communication Skills	Ability to express thoughts, ideas or facts in a clear, civil, and concise manner in both written and oral form; listens to and understands others	
Job Knowledge	Degree to which team member knows, understands, and applies knowledge and skills to effectively perform job assignments	
Goal Achievement	Degree to which team member has accomplished goals, both pre-established and added over time	
Initiative	Degree to which team member has originated independent action to obtain desired job objectives	
Accountability and Integrity	Taking responsibility for the work performed in three dimensions: 1. owning any problem or task to resolve the issue quickly and effectively; 2. taking responsibility for one's actions, including recognition and correction of efforts in a responsive and timely manner; 3. being trustworthy and responsible	
Team Management (when applicable)	Degree to which team member coaches, evaluates, develops, inspires, sets expectations, recognizes achievements, manages conflict, aligns performance goals with institutional goals, provides feedback, leads team members, and delegates when necessary	
(Other dimensions determined by your institution)		
	Total	
	Divided by Total Number of Dimensions	
Overall Rating	**Degree to which the team member achieved the position objectives (average score of the above)**	

Source: Advancement Forum interviews and analysis.

Talent and Training Prioritization Matrix (cont.)

Instructions: Use the following rating scale to assess the dimensions of employee performance outlined on the preceding page.

Performance Level	Performance Level Definitions
5: Outstanding	The team member has performed at a level that consistently exceeded the requirements of the job and has affected a significantly positive difference in job results. One of the best team members I have ever supervised.
4: Exceeds Target	The team member always or almost always demonstrates top performance. He/she often surpasses expectations for the role and regularly does more than what is required.
3: On Target	The team member achieves effective results, making a contribution that meets operating and functional requirements or is effectively developing in this area.
2: Inconsistent	The team member demonstrates an ability to meet expectations, but does so erratically, requiring reminders and guidance in the particular performance area. Corrective action may need to be taken to improve the performance.
1: Unsatisfactory	An unacceptable level of performance with serious concerns about future performance. The team member does not fulfill basic requirements of the position. Urgent remedial steps should be taken to address the deficiencies.

Source: Advancement Forum interviews and analysis.

Visualizing the Talent Matrix

Part II: Assessing Performance and Planning Future Action

Employee potential is a subjective, yet critical component of assessing the talent pool. As such, any assessment should be treated with great respect. Identifying a high-potential employee is defined by Aon Hewitt as “the assessment of an employee’s ability to rise to and succeed in a more senior or expanded role.”[1] Employee potential includes an individual's performance, character, capability and motivation. To assist in this categorization, a definition for each of the nine boxes below has been developed to help you think of the individual and assess where you think that they might fall in the talent matrix.

Instructions: Use the overall performance rating (p. 40) to determine the position of each of your direct reports on the performance axis (or x-axis) of the talent management matrix below. Use the matrix to help foster a conversation with leaders and managers regarding the potential of each individual, the purpose of which is to identify potential training opportunities and internal trainers.

Talent Management Matrix

High	May be new in the job; may be in the wrong job/have the wrong manager **Action:** Give time for development or intervene	Valued talent, capacity for advancement after further potential realized **Action:** Look for opportunities for growth and new experiences; target to lead training	Capacity for immediate advancement; potential for senior succession **Action:** Promote when possible; give top-level assignments and executive exposure; target to lead training; reward and recognize
Potential	May be new in job or organization; may have lost pace with changes in the organization **Action:** Continue orientation; give time for development; challenge with clear expectations	Steady and dependable performer but capable of more; may not understand recent changes in the organization **Action:** Challenge; allow opportunities for growth and new experiences; target to lead training	Capacity for immediate, one-level advancement; consider best track—individual contributor, project manager, or general manager **Action:** Look for opportunity to expand role; challenge, reward, and recognize; engage in decision making; target to lead training
Low	Has reached job potential and is underperforming **Action:** Manage performance; set clear improvement plan; or exit organization	Steady and dependable; has reached career potential **Action:** Engage, challenge, focus, and motivate	Excellent performer; has reached career potential **Action:** Engage in training others; challenge, reward, and recognize

1 **2** **3** **4** **5**

Low High

Performance

Source: Advancement Forum interviews and analysis.

Training Leaders Worksheet

Internal Professional Development Faculty Pool

Some of the best trainers are star fundraisers. Use the results from the nine-box matrix to identify potential training leaders.

Instructions: Use this worksheet to determine how to leverage key staff leaders' strengths for professional development purposes.

Name	Skill Strengths	Leadership Avenues	Timeline and Workload	Type of Recognition
		☐ Serve as a mentor ☐ Lead a group session(s) ☐ Conduct joint visits ☐ Lead onboarding for cohort ☐ Lead PD committee/ subcommittee ☐ ____________________	Example: 6 months, 2 hours per week	Example: Recognition in performance review and highlight in monthly all-staff meeting
		☐ Serve as a mentor ☐ Lead a group session(s) ☐ Conduct joint visits ☐ Lead onboarding for cohort ☐ Lead PD committee/ subcommittee ☐ ____________________		
		☐ Serve as a mentor ☐ Lead a group session(s) ☐ Conduct joint visits ☐ Lead onboarding for cohort ☐ Lead PD committee/ subcommittee ☐ ____________________		
		☐ Serve as a mentor ☐ Lead a group session(s) ☐ Conduct joint visits ☐ Lead onboarding for cohort ☐ Lead PD committee/ subcommittee ☐ ____________________		
		☐ Serve as a mentor ☐ Lead a group session(s) ☐ Conduct joint visits ☐ Lead onboarding for cohort ☐ Lead PD committee/ subcommittee ☐ ____________________		
		☐ Serve as a mentor ☐ Lead a group session(s) ☐ Conduct joint visits ☐ Lead onboarding for cohort ☐ Lead PD committee/ subcommittee ☐ ____________________		
		☐ Serve as a mentor ☐ Lead a group session(s) ☐ Conduct joint visits ☐ Lead onboarding for cohort ☐ Lead PD committee/ subcommittee ☐ ____________________		
		☐ Serve as a mentor ☐ Lead a group session(s) ☐ Conduct joint visits ☐ Lead onboarding for cohort ☐ Lead PD committee/ subcommittee ☐ ____________________		

Source: Advancement Forum interviews and analysis.

EAB

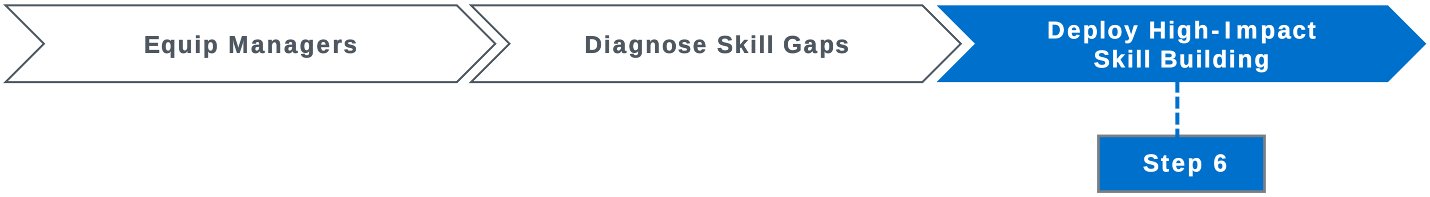
Deploy High-Impact Skill Building

IMPERATIVE

3

- Step 6: Optimize Traditional Training
- Step 7: Integrate Learning into the Workflow
- Step 8: Provide Practice Environments

Step 6: Optimize Traditional Training



Once advancement leaders have isolated the areas of development for MGOs, it is imperative to develop a plan for meeting the objectives laid-out in individual development plans. One of the quickest ways to accomplish this, especially if you've already been offering professional development to your advancement team, is to make better use of the tools already at your disposal. If you are developing a program or have a current program in its nascent stage, these tools can be used to create a professional development program that is based upon the imperatives of the Professional Development Playbook.

Use the tools and templates in this section to help refine your existing professional development programming and/or create "quick wins" within a new program.

Tool Name	Description	Pages
Professional Development Curriculum Review	Use this tool to evaluate your existing training opportunities against the key lessons from across the PD Playbook's research	47
Major Gift Officer Onboarding Toolkit	Use this toolkit to create an onboarding program that can be tailored to the needs of individuals	48
Development Opportunity Match Cheat Sheet	Overviews development opportunities that can be employed at your institution	49-51
Webconference Lunch and Learn Guide	This guide provides a starting point for discussion, implementation, and/or practice planning immediately following an in-house training session	52
Pre-conference Form	To ensure that conference attendance meets training, require that staff members complete this form which elucidates learning objectives upfront and requires group sharing following the conference	53
Post-conference Survey Form	Use this form to track applicability and quality of conferences after staff attend; this information can be used to create a conference value database	54
Targeted Mentorship Program Guide	This guide provides all the necessary resources and templates to developed a mentorship program focused on targeting skill building	55-66
Cohort Learning Community Picklist	Based on cohort learning opportunities examined in this study, the picklist outlines cohort segments and potential curriculum	67

Source: Advancement Forum interviews and analysis.

Professional Development Curriculum Review

Assessing Offerings Against Key Insights

Instructions: Use the following spreadsheet to evaluate your current professional development curriculum. Determine where enhancements can be made to your existing programming using the high-impact skill building tools we've included in this toolkit.

	Evaluation Criteria						
Current Training Element	Aligned to Individual Needs	Furthers Institution Goals	Builds Key, Identified Skills	Works with Busy Schedules	Prompts Application of Skills	Embeds Real-time Feedback	Provides Measurable Outcomes
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No

Source: Advancement Forum interviews and analysis.

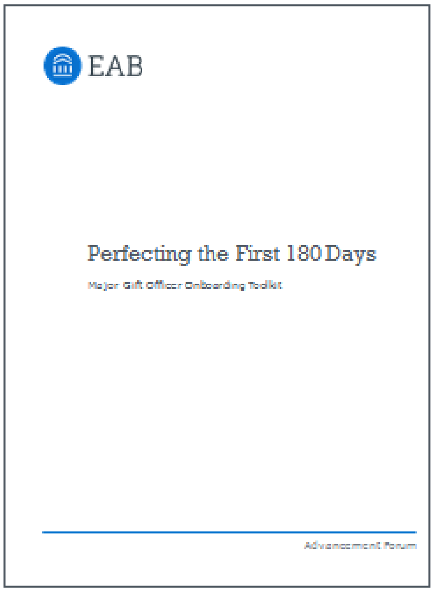
Major Gift Officer Onboarding Toolkit

Perfecting the First 180 Days

Tailored Onboarding in Brief

The success or failure of new MGOs is often determined within their first 90 days on the job. Tailored onboarding allows new hires to gain the skills needed for success while enabling them to build stronger relationships within the advancement organization.

The Major Gift Officer Onboarding Toolkit contains resources to aid development leaders in training frontline fundraisers (and other staff) during their first 90+ days on-the-job.



EAB

Perfecting the First 180 Days

Major Gift Officer Onboarding Toolkit

Advancement Forum

Major Gift Officer Onboarding Toolkit Contents

- Guide for Implementing Tailored Onboarding at Your Institution
- MGO Skills Pick List and Prioritization Tool
- MGO Skills Gap Self Assessment
- Flexible Onboarding Plan Template
- Guide to Determine Performance Goals
- Performance Goals List
- Performance Goals Discussion Guide
- 90-Day Onboarding Checklist Template
- First Check-In Discussion Guide
- Milestone Check-In Discussion Guide

Putting the Toolkit into Action

1 Hiring

Interviewers can use the MGO Skills Pick List and Flexible Onboarding Template to:

- Determine the skills necessary for all MGOs to succeed
- Note a new MGO's strengths and weaknesses to address during onboarding

2 Orientation

Managers can use the Performance Goals List and First Check-In Discussion Guide to:

- Establish acclimation metrics that allow the new hire to understand how performance is measured
- Engage in more meaningful conversations with new hires

3 First 90+ Days

Advancement leaders can use the 90-Day Onboarding Checklist Template to:

- Establish expectations for tasks to be completed by both the manager and the new hire
- Ensure that all new hires undergo a high-quality onboarding experience

Download the Major Gift Officer Onboarding Toolkit at **eab.com**

Source: Advancement Forum interviews and analysis.

Development Opportunity Match Cheat Sheet

Determining the Best Way to Deliver Content

Notes on using the cheat sheet: The following grid outlines common development opportunities alongside the specific competencies or skills addressed by each. Additionally, it includes pros, cons, and critical success factors for implementation. Equip talent development leaders and managers with this quick-reference tool to help them quickly locate in this toolkit the most suitable development opportunities for each employee. Prior to grid distribution, delete any development opportunities from the list that are not available at your institution.

	Outcomes-Oriented Mentoring (p. 55)	**Cohort-Style Learning Communities (p. 67)**
Description	Formal or informal relationship with higher-level leaders or role models who can offer advice or guidance on how to develop specific competencies	Classroom-based training designed around clearly identified skill gaps of key groups who meet multiple times over an extended period in order to build relationships and solidify knowledge
Key Competencies or Skills Developed	• Motivating and influencing • Giving and receiving feedback • Effective communication • Collaboration • Process management • Internal logistics and politics	• Prospect management • Strategy development • Making the ask • Management fundamentals • Career development • Identifying and recruiting talent
Pros	• Individual attention allows for precise targeting of specific behaviors • Mentor can assist in overcoming mentee's unique personal challenges • Interactions with experts or veterans allows for mentee to avoid pitfalls by learning from others' experiences	• Interactive workshops (e.g. discussions, role-play, coaching, on-the-spot strategy creation) • Members continuously interact with each other through the learning process • Build comradery and collaboration among peers
Cons	• Without a formal matching process, it's difficult to make matches that result in a productive relationship • Difficult to find leaders who are both willing and capable of mentoring effectively	• Requires time for the development and refinement of learning modules • Requires senior staff to serve as faculty and takes time away from frontline responsibilities
Critical Success Factors	• Deliberately match participants based upon competencies and skills needed to be developed, do not allow for self-selection • Ensure mentors have expertise in specific area in which the mentee requires assistance and can effectively communicate that knowledge • Secure a time-bound commitment from both mentor and mentee to 'test' the relationship (six months is recommended)	• A curriculum plan that includes touchpoints before, during, and after for participants to maximize learning and outcomes • Deliberately group participants based upon competencies and skills needed to be developed, do not allow for self-selection • Smaller shops should look to similar skills in other parts of the institution who would want to be a part of a cohort learning program
Applicability	• Appropriate for all types of organizations • Applicable for all levels within advancement	• Appropriate for larger teams, smaller shops will need to collaborate with colleagues from across campus • Applicable for all levels within advancement

Source: Advancement Forum interviews and analysis.

Development Opportunity Match Cheat Sheet (cont.)

	Targeted Joint Visits (p. 69)	**Real-Time Strategy Coaching (p. 71)**	**Crucible Roles (p. 72)**
Description	Time-limited, direct observation of either experienced gift officers in action or junior gift officers in action to build key skills or meet development objectives	Prospect focused partnerships designed to advance or develop relationships with major and principal-level gifts donors and prospects	Time-limited expansion of job to include responsibilities for new areas or leading key projects; should include opportunities for executive exposure
Key Competencies or Skills Developed	• Effective communication (verbal and non-verbal) • Orchestrating a visit • Building and strengthening relationships • Moves management • Making the ask	• Strategy formation • Strategy execution • Principal gifts • Donor qualification and activation • Giving and receiving feedback • Collaboration	• Constructive thinking • Accountability • Building and strengthening relationships • Communicating effectively • Management and leadership • Decision-making
Pros	• Limited disruption to work schedule for both staff members involved in the visit • Direct exposure to advanced decision-making and/or day-to-day responsibilities • Individual attention allows for precise targeting of specific skills and behaviors	• Limited disruption to work schedule for both staff members involved in the coaching engagement • Direct exposure to senior-level staff and high-level prospect strategy • Prospect-based parings allow greater access and opportunities to collaborate across the team	• Increases high potential staff's familiarity with other parts of the organization, enabling them to learn new skills and form cross-departmental relationships • Opportunity to 'try on' a new role before assuming full responsibility • Increased recognition within the organization
Cons	• Ensure joint visits happen with donors who are deemed safe • Difficult to find senior MGOs or leaders who are both willing and capable of making time to do joint visits	• Ground rules must be established to ensure follow-through on the part of both parties engaged in the coaching relationship	• Takes time away from ongoing work responsibilities • If not prioritized, work can go unnoticed by senior leaders
Critical Success Factors	• Determine development objectives for the focus of joint visits upfront prior to their initiation • Deliberately match participants based upon competencies and skills needed to be developed, do not allow for self-selection • Shared credit for all parties involved in joint visits • Ensure senior MGO being paired with junior or developing MGO can effectively coach, mentor, and provide pointed positive and constructive feedback	• Shared credit for all parties involved in the coaching partnership • Clear steps for requesting the coaching relationship • Ground rules that outline the expectations and responsibilities of the parties involved in the coaching relationship • A senior leadership team willing to build collaboration across the organization	• Clearly defines process and timeline for the role • Supervisors, leaders, and peers provide support • Ensure the role is challenging, complex and engaging • Pre-established metrics and measures for success are in place • Achievements recognized through performance reviews, temporary titles, senior leader access, or public announcements
Applicability	• Appropriate for all types of organizations • Applicable for all levels; especially effective for developing key skills of team members involved in donor interactions	• Appropriate for all types of organizations • Applicable for all levels; especially helpful in the development of strategy formation and execution for prospects and donors	• Appropriate for all types of organizations • Applicable for levels; especially effective for high-potential staff and for leadership succession planning

Source: Advancement Forum interviews and analysis.

Development Opportunity Match Cheat Sheet (cont.)

	Group Case Study Sessions (p. 74)	**Simulation-Based Coaching (p. 77)**
Description	Classroom-based session that take real-world case examples and involves the team in an inquiry-based dialogue to further strategy formation, prospect management, and problem solving	Classroom-based two-day session that includes filmed role play and multiple opportunities for self-reflection, self-assessment, and peer feedback
Key Competencies or Skills Developed	• Motivating and influencing • Moves management • Problem solving • Giving and receiving feedback • Effective communication • Collaboration • Inquiry-based dialogue	• Effective communication (verbal and non-verbal) • Orchestrating a visit • Building and strengthening relationships • Moves management • Making the ask
Pros	• Low- to no-cost to conduct; built with existing examples gleaned from within the organization • Improves collaboration • Highly customizable to individual challenges and development needs	• Multiple avenues to receive feedback • Filming the role play allows MGOs to view non-verbal and verbal communication with donors • Allows the opportunity to work on a large number of skills
Cons	• Senior MGOs can dominate the session if not asked to let junior staff participate • Without staying focused on inquiry-based dialogue, the session can devolve into advice-giving	• Requires significant investment of time to undertake the sessions • Necessitates digital recording devices
Critical Success Factors	• A strong facilitator • Case summaries that provide pertinent details and are challenging, yet general • Inexperienced MGOs must be prompted to contribute • An introduction to the idea of inquiry-based dialogue and ground rules for the sessions	• Mandatory participation by all frontline fundraising staff (should not be made optional) • Dedicated facilitator to keep the sessions on track and to help with feedback • Realistic scenarios • Feedback and self-reflection forms to guide learning and prompt reflection
Applicability	• Appropriate for all types of organizations • Applicable for all levels within advancement	• Appropriate for all types of organizations • Applicable for all levels within advancement

Source: Advancement Forum interviews and analysis.

Webconference Lunch and Learn Guide

A Starter Kit for Learning Session Follow-Up Conversations

Instructions: Use the Discussion/Self-Reflection Guide at the conclusion of the webconference to help you prioritize the implementation of best practices and ideas provided based on your institution's goals, available resources, and timeline. Use the Web-Conference Next Steps Table to assign program responsibility and next steps.

Discussion / Self-Reflection Guide

1. What were the main strategies highlighted during this webinar?

   ____

   ____

2. Who on campus can we contact to learn more about this topic? Who can help implement strategies?

   ____

   ____

3. What efforts do we already have in place? What can be improved? What should stay?

   ____

   ____

4. What resources do we currently have to dedicate to this subject?

   ____

   ____

5. Additional Web-Conference-specific question: ______________________________________

   ____

   ____

Webconference Next Steps Table

Tactic / Idea	Immediate	Possible for Future	Not Applicable	Next Steps	Staff Assigned

Source: Advancement Forum interviews and analysis.

Pre-conference Form

Requiring Learning Objectives Before Sending Staff to Conferences

Instructions: Advancement staff should complete this form *before* attending a conference to clarify their personal learning objectives. Managers may use this form in follow-up with conference attendees to determine whether they attained their own learning objectives and participated fully in conference proceedings.

Name: ______________________________ **Conference / Class Name:** _____________________________

Dates: ______________________________ **Location:** ____

Discussion / Self-Reflection Questions

1. Why did you choose this conference/class?

____

____

____

2. List three things that you hope to gain from this conference/class:

____

____

____

3. How will this conference/class advance your professional development goals or strengthen your skills?

____

____

____

4. What session(s) are you most looking forward to?

____

____

____

5. After this conference/class, how will you share what you have learned with the rest of the team?

____

____

____

Source: Advancement Forum interviews and analysis.

Post-conference Survey

Collecting Inputs for Your Conference Value Database

Instructions: Advancement staff should complete this form *after* attending a conference to state what they learned and whether the conference would be valuable for other staff in the future. Advancement leadership staff should maintain a database of these forms, which staff may consult when deciding which future conferences to attend.

Name: ______________________________
Dates: ______________________________
Conference / Class Name: _____________________________
Location: ____

Conference Value Questions

1. What are 3 things you learned during this conference/class?

____

____

____

2. What surprised you at this conference/class?

____

____

3. What do you want the team to know from this conference/class?

____

____

4. Which sessions were the most useful?

____

____

5. Which sessions were the least useful?

____

____

6. Would you recommend this conference/class to a colleague? ☐ Yes ☐ No

7. Who should consider this opportunity in the future?

____

____

Source: Advancement Forum interviews and analysis.

Targeted Mentorship Program Guide

Mentorship Orientation Overview

The role of a mentor is vague at most institutions, with mentors wearing many different hats. As a result, mentors and mentees don't know where to focus. Follow the steps in this launch guide to create an outcomes-oriented mentorship program that benefits both mentors and mentees.

Step 1: Set Expectations

Educate potential mentors and mentees about what they must give and take from the program so that all participants are on the same page. Consider creating job descriptions, like the sample from University of Michigan below, to clearly outline roles.

Step 2: Recruit Mentors

Ask experienced fundraisers to serve as mentors. Recruit mentors by asking managers to recommend strong fundraisers, or to serve as mentors themselves. Consider sending out an email to managers with the following elements:

Checklist for Mentor Recruitment Email

- ☐ Request for assistance
- ☐ Summary of the program
- ☐ Desired qualities of potential mentors
- ☐ Time commitment for mentors
- ☐ Timeline for program
- ☐ Deadline to recommend mentor
- ☐ Link to input recommendation
- ☐ Thank you

Step 3: Recruit Mentees

Send out an email inviting managers to recommend fundraisers who would benefit from participating in the mentorship program. Consider sending out an email to managers with the following elements:

Checklist for Mentee Recruitment Email

- ☐ Request for assistance
- ☐ Summary of the program
- ☐ Qualifications/requirements for mentees
- ☐ Timeline for program
- ☐ Deadline to recommend mentee
- ☐ Link to input recommendation
- ☐ Thank you

Step 4: Determine Matches

Ask mentor and mentee applicants to fill out a detailed form that collects information such as goals, current skills, and interest in participating in the program. Sample application forms from the University of Michigan are provided in the Mentor Application Template (p. 61) and the Mentee Application Template (p. 63).

After collecting information, analyze forms and align matches based on the alignment of:

- Mentor skill strengths and mentee skill gaps
- Mentor skill strengths and mentee goals
- Mentor interests and mentee interests

Source: Adapted from the University of Michigan, Ann Arbor, MI; Advancement Forum interviews and analysis.

Targeted Mentorship Program Guide (cont.)

Step 5: Support Mentorships

Allow mentorships to progress independently, but consider deploying the following resources to support the program from start to finish:

Orientations for mentors and mentees.

Topics to cover for mentors

- Summary and purpose of the program
- Questions to ask mentees
- Mentorship strategies

Topics to cover for mentees

- Summary and purpose of the program
- Strategies to track progress to goal
- How to build relationships with mentors

Mid-program email with articles for reflection, program tips, calendar reminders, etc.

Website that serves as an information resource center. It can include articles, FAQs about the program, registration links, role descriptions, calendars, etc.

Step 6: Recognize Participants

Show mentors that you appreciate their time and guidance through recognition in performance reviews, at all-staff meetings, or through monetary or non-monetary benefits. Consider hosting a closing ceremony to recognize mentees who completed the programs and achieved their pre-defined goals.

Step 7: Evaluate and Revise

Conduct evaluations using the Mentorship Post-Program Evaluation (p. 65). Aggregate the information collected, look for areas of improvement, and adjust accordingly. Also, be sure to check-in with mentees' managers to see whether mentees were able to achieve their goals and develop their skillsets.

Source: Adapted from the University of Michigan, Ann Arbor, MI; Advancement Forum interviews and analysis.

Targeted Mentorship Program Guide (cont.)

Mentor Recruitment Email Template

Instructions: Use this email template to recruit more senior fundraisers to serve as mentors in an outcomes-oriented mentorship program. Send the email at least three weeks before the deadline to register, giving mentors adequate time to consider their interest in the program. Information in brackets should be customized to fit your institution.

Dear Colleagues,

We are beginning a new mentoring program for development staff, and we are asking for your assistance in identifying appropriate participants for the MENTOR role.

As a reminder, the goal of this program is to maximize performance and increase engagement and retention over time by helping participants increase their understanding of the “bigger picture,” broaden or deepen an existing skillset, or gain exposure to knowledge that is relevant to one’s job. Please be aware that this program is not designed to address basic job training, career planning and exploration, or information interviews.

Call for Mentors- Due [*deadline for volunteering to be a mentor*]

In order to provide the most effective experience for our mentees, we need a large and varied pool of mentors in various roles. The time commitment for mentors is at least two hours of personal contact per month from [*start date*] to [*end date*]. We hope you will consider serving as a mentor, and we encourage you to share this email with anyone on your team who would add value as a mentor. Please keep in mind that being a mentor can be a valuable opportunity to develop or energize a qualified member of your team.

Please click here to register as a mentor: [*link to mentorship registration form*]
This link will open a form that should take no more than five to 10 minutes to complete. It will enable us to match mentees with mentors who are best suited to assist with their developmental needs and interests.

We will be in touch again to request nominations for mentees, and we thank you in advance for your support of this program. Again, please forward this email to anyone whom you believe would be effective as a mentor. Please let us know if you have any questions or concerns. You can contact me directly at [*email address and/or phone number*].

Sincerely,
[*Your Name*]

Source: Adapted from the University of Michigan, Ann Arbor, MI; Advancement Forum interviews and analysis.

Targeted Mentorship Program Guide (cont.)

Mentee Recruitment Email Template

Instructions: Use this email template to recruit newer fundraisers to participate as mentees in an outcomes-oriented mentorship program. Send the email at least two weeks after sending the mentor recruitment email. Information in brackets should be customized to fit your institution.

Dear Colleagues,

As you know, we are beginning a new mentoring program for development staff, and we appreciate the response to our call for mentors. We are now asking for your help in identifying participants for the mentee role.

Call for Mentees- Due [*deadline for recommending a mentee*]

Mentees must have served at least one year in their current role, and must have a history of success with no current performance issues. The attached role description includes specific mentee responsibilities and a success profile to help identify candidates who are likely to benefit from participating. Candidates should be focused, goal-oriented, and self-directed. They should have a sincere desire to learn and grow in their role. Mentees are also responsible for driving the relationship, and identifying their goals for achievement.

Next Steps

Please reply to this email no later than [*due date for recommending a mentee*] with the names of any employees on your team who would benefit from working with a mentor for a period of [*duration of mentorship program*]. We will follow-up with those nominees individually to collect more information.

Thank you again for your support, and please feel free to contact me if you have any further questions or would like to discuss potential mentees on your team.

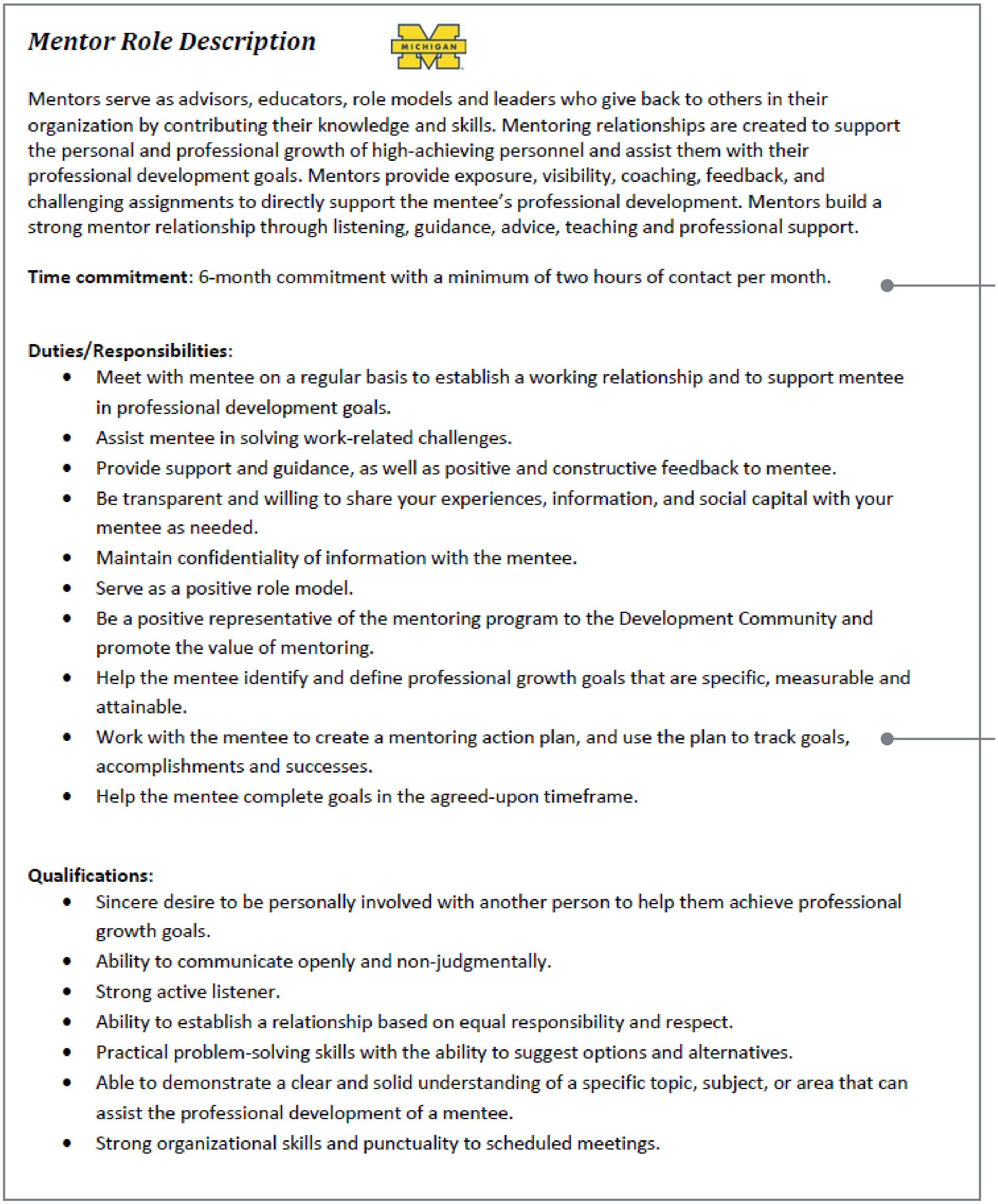
Sincerely,
[*Your Name*]

Source: Adapted from the University of Michigan, Ann Arbor, MI; Advancement Forum interviews and analysis.

Targeted Mentorship Program Guide (cont.)

Mentor Role Description

Instructions: In order to set mentorship expectations up front, use this sample description and modify as needed to apply to your own mentorship program.



Mentor Role Description

Mentors serve as advisors, educators, role models and leaders who give back to others in their organization by contributing their knowledge and skills. Mentoring relationships are created to support the personal and professional growth of high-achieving personnel and assist them with their professional development goals. Mentors provide exposure, visibility, coaching, feedback, and challenging assignments to directly support the mentee's professional development. Mentors build a strong mentor relationship through listening, guidance, advice, teaching and professional support.

Time commitment: 6-month commitment with a minimum of two hours of contact per month.

Duties/Responsibilities:

- Meet with mentee on a regular basis to establish a working relationship and to support mentee in professional development goals.
- Assist mentee in solving work-related challenges.
- Provide support and guidance, as well as positive and constructive feedback to mentee.
- Be transparent and willing to share your experiences, information, and social capital with your mentee as needed.
- Maintain confidentiality of information with the mentee.
- Serve as a positive role model.
- Be a positive representative of the mentoring program to the Development Community and promote the value of mentoring.
- Help the mentee identify and define professional growth goals that are specific, measurable and attainable.
- Work with the mentee to create a mentoring action plan, and use the plan to track goals, accomplishments and successes.
- Help the mentee complete goals in the agreed-upon timeframe.

Qualifications:

- Sincere desire to be personally involved with another person to help them achieve professional growth goals.
- Ability to communicate openly and non-judgmentally.
- Strong active listener.
- Ability to establish a relationship based on equal responsibility and respect.
- Practical problem-solving skills with the ability to suggest options and alternatives.
- Able to demonstrate a clear and solid understanding of a specific topic, subject, or area that can assist the professional development of a mentee.
- Strong organizational skills and punctuality to scheduled meetings.

Limited time commitment

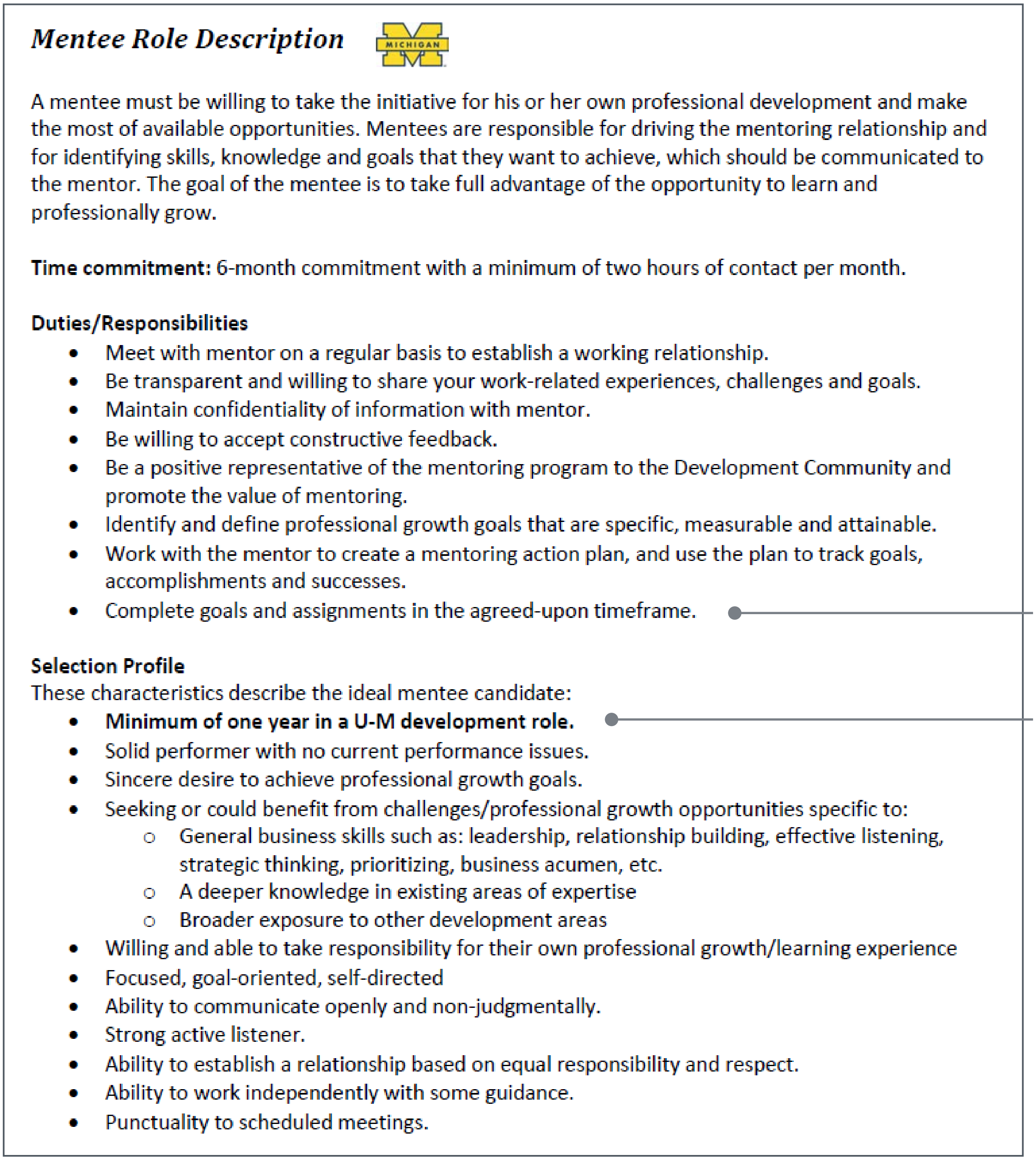
Clear action item

Source: University of Michigan, Ann Arbor, MI; Advancement Forum interviews and analysis.

Targeted Mentorship Program Guide (cont.)

Mentee Role Description

Instructions: In order to set mentorship expectations up front, use this sample description and modify as needed to apply to your own mentorship program.



Mentee Role Description

A mentee must be willing to take the initiative for his or her own professional development and make the most of available opportunities. Mentees are responsible for driving the mentoring relationship and for identifying skills, knowledge and goals that they want to achieve, which should be communicated to the mentor. The goal of the mentee is to take full advantage of the opportunity to learn and professionally grow.

Time commitment: 6-month commitment with a minimum of two hours of contact per month.

Duties/Responsibilities

- Meet with mentor on a regular basis to establish a working relationship.
- Be transparent and willing to share your work-related experiences, challenges and goals.
- Maintain confidentiality of information with mentor.
- Be willing to accept constructive feedback.
- Be a positive representative of the mentoring program to the Development Community and promote the value of mentoring.
- Identify and define professional growth goals that are specific, measurable and attainable.
- Work with the mentor to create a mentoring action plan, and use the plan to track goals, accomplishments and successes.
- Complete goals and assignments in the agreed-upon timeframe.

Selection Profile

These characteristics describe the ideal mentee candidate:

- **Minimum of one year in a U-M development role.**
- Solid performer with no current performance issues.
- Sincere desire to achieve professional growth goals.
- Seeking or could benefit from challenges/professional growth opportunities specific to:
  - General business skills such as: leadership, relationship building, effective listening, strategic thinking, prioritizing, business acumen, etc.
  - A deeper knowledge in existing areas of expertise
  - Broader exposure to other development areas
- Willing and able to take responsibility for their own professional growth/learning experience
- Focused, goal-oriented, self-directed
- Ability to communicate openly and non-judgmentally.
- Strong active listener.
- Ability to establish a relationship based on equal responsibility and respect.
- Ability to work independently with some guidance.
- Punctuality to scheduled meetings.

Clear expectation to complete goals

Must be in position for at least one year

Source: University of Michigan, Ann Arbor, MI; Advancement Forum interviews and analysis.

Targeted Mentorship Program Guide (cont.)

Mentor Application Template

Instructions: Potential mentors should complete this form to be considered for participation in the mentorship program. Responses should be catalogued in the Mentorship Matching Tool for matching with mentees.

Personal Information

Name: ____ Job Title: _______________________________________

Department: _________________ Years in Position: _______ Years in development at this institution: _______

Mentorship Program Interests and Goals

1. Have you participated in a mentoring program as a mentor in your past work history?

☐ Yes ☐ No

2. Why are you interested in serving as a mentor?

____

____

3. Rank the following mentorship contexts in order of preference:
1 being most preferable, 3 being least preferable.

_______ Providing broad exposure to your areas of expertise to someone from a different area within the development community

_______ Providing broad exposure to your areas of expertise to someone from a different area within the development community

_______ Providing guidance in developing a greater knowledge of the development profession in general

4. In which of the following areas do you have expertise?
Check all that apply

Functional Areas of Development

- ☐ Administrative support
- ☐ Alumni relations
- ☐ Annual giving
- ☐ Athletics
- ☐ Campaign strategies
- ☐ Corporate relations
- ☐ Data and information analysis
- ☐ Data management
- ☐ Education and training
- ☐ Events
- ☐ Faculty relations
- ☐ Finance and administration
- ☐ Foundation relations
- ☐ Gift and records administration
- ☐ Gift planning
- ☐ Human resources
- ☐ Information technology
- ☐ International giving
- ☐ Legal Services
- ☐ Major Gifts
- ☐ Marketing and communications
- ☐ Parent giving
- ☐ Prospect development and analytics
- ☐ Public relations
- ☐ Reunion giving
- ☐ Stewardship
- ☐ Student philanthropy
- ☐ Web and application development

General Business Skills

- ☐ Project management
- ☐ Time management
- ☐ Prioritization
- ☐ Presentation skills
- ☐ Participating in meetings
- ☐ Leading meetings
- ☐ Team collaboration
- ☐ Goal setting

Personal Skills

- ☐ Building Relationships
- ☐ Effective Communication
- ☐ Listening skills
- ☐ Responding to change
- ☐ Work-life balance

Source: University of Michigan, Ann Arbor, MI; Advancement Forum interviews and analysis.

Targeted Mentorship Program Guide (cont.)

Mentor Application Template (cont.)

5. In which of the following areas would you be most interested in serving as a mentor? *Check all that apply.*

Functional Areas of Development

- ☐ Administrative support
- ☐ Alumni relations
- ☐ Annual giving
- ☐ Athletics
- ☐ Campaign strategies
- ☐ Corporate relations
- ☐ Data and information analysis
- ☐ Data management
- ☐ Education and training
- ☐ Events
- ☐ Faculty relations
- ☐ Finance and administration
- ☐ Foundation relations
- ☐ Gift and records administration
- ☐ Gift planning
- ☐ Human resources
- ☐ Information technology
- ☐ International giving
- ☐ Legal services
- ☐ Major gifts
- ☐ Marketing and communications
- ☐ Parent giving
- ☐ Prospect development and analytics
- ☐ Public relations
- ☐ Reunion giving
- ☐ Stewardship
- ☐ Student philanthropy
- ☐ Web and application development

General Business Skills

- ☐ Project management
- ☐ Time management
- ☐ Prioritization
- ☐ Presentation skills
- ☐ Participating in meetings
- ☐ Leading meetings
- ☐ Team collaboration
- ☐ Goal setting

Personal Skills

- ☐ Building Relationships
- ☐ Effective Communication
- ☐ Listening skills
- ☐ Responding to change
- ☐ Work-life balance

Is there anything else we should know when matching mentees in these areas of interest?

____

____

____

6. What other general strengths would make you a successful mentor?

____

____

____

7. What qualities would you expect to find in a mentee that would help you have a successful relationship?

____

____

____

Source: University of Michigan, Ann Arbor, MI; Advancement Forum interviews and analysis.

Targeted Mentorship Program Guide (cont.)

Mentee Application Template

Instructions: Potential mentees should complete this form to be considered for participation in the mentorship program. Responses should be catalogued in the Mentorship Matching Tool for matching with mentees.

Personal Information

Name: ____ Job Title: _______________________________________

Department: _________________ Years in Position: _______ Years in development at this institution: _______

Mentorship Program Interests and Goals

1. Why are you interested in working with a mentor?

____

____

2. Which of the following areas are you interested in learning more about?
Check all that apply.

☐ Administrative support
☐ Alumni relations
☐ Annual giving
☐ Athletics
☐ Campaign strategies
☐ Corporate relations
☐ Data and information analysis
☐ Data management
☐ Education and training
☐ Events
☐ Faculty Relations
☐ Finance and administration
☐ Foundation relations
☐ Gift and records administration
☐ Gift planning
☐ Human resources
☐ Information technology
☐ International giving
☐ Legal services
☐ Major gifts
☐ Marketing and communications
☐ Parent giving
☐ Prospect development and analytics
☐ Public relations
☐ Reunion giving
☐ Stewardship
☐ Student philanthropy
☐ Web and application development

3. Which of the following skillsets would you want to work on with a mentor?

☐ Professional knowledge and skills (including exposure to a different area within the development community, a deeper knowledge of your area of expertise, or a deeper knowledge of the development community in general)

☐ General business skills (including managing projects, presentation skills, leading or participating in meetings, time management, prioritization, or team collaboration)

☐ Personal skills (including building relationships, effective communication, listening skills, responding to change, and work-life balance)

Describe an initial goal for yourself based on the selected skillset.

____

____

____

Source: University of Michigan, Ann Arbor, MI; Advancement Forum interviews and analysis.

Targeted Mentorship Program Guide (cont.)

Mentee Application Template (cont.)

4. To have a successful mentor relationship, what qualities would you look for in a mentor?

   ____

   ____

   ____

5. What will you do to contribute to a successful mentor relationship?

   ____

   ____

   ____

Source: University of Michigan, Ann Arbor, MI;
Advancement Forum interviews and analysis.

Targeted Mentorship Program Guide (cont.)

Mentorship Post-program Evaluation

Instructions: Mentees should complete this form at the conclusion of the mentorship program. They may complete the form anonymously, or include their name. Advancement staff should respond to their concerns individually and keep all comments in confidence.

Name (optional, but encouraged): ____

1. Which of the following best describes the amount of time you spent with your mentor per month?

☐ Less than two hours ☐ Approximately two hours ☐ More than two hours

2. Generally, how often did you contact your mentor per month?

☐ One quality contact ☐ Two quality contacts ☐ More than two quality contacts

3. Contacts with your mentor primarily occurred in which format?

☐ In person ☐ Over the phone ☐ Equally divided between phone and in-person contacts

4. Please rate the overall quality of your mentoring experience:

☐ Excellent ☐ Very Good ☐ Good ☐ Fair ☐ Poor

5. Did the frequency of your interactions with your mentor meet your expectations?

☐ Yes ☐ For the most part ☐ Somewhat ☐ No

6. Did the quality of your interactions with your mentor meet your expectations?

☐ Yes ☐ For the most part ☐ Somewhat ☐ No

7. Do you feel that your relationship with your mentor was successful? ☐ Yes ☐ No
Why or why not?

____

____

____

8. Did your goals evolve over the course of the program? ☐ Yes ☐ No
If so, how?

____

____

____

Source: University of Michigan, Ann Arbor, MI; Advancement Forum interviews and analysis.

Targeted Mentorship Program Guide (cont.)

Mentorship Post-program Evaluation (cont.)

9. Would you encourage your colleagues to participate in this experience? ☐ Yes ☐ No
Why or why not?

____

____

____

10. How can we improve the mentoring program for future participants?

____

____

____

11. What advice should we give to future mentors to help them be successful in their role?

____

____

____

12. Is there any other feedback you would like to provide?

____

____

____

Source: University of Michigan, Ann Arbor, MI;
Advancement Forum interviews and analysis.

Cohort Learning Community Picklist

Creating Cohorts and Getting a Head Start on Curriculum

Instructions: Talent management leaders should use this guide to establish the key segments of advancement staff they would like to target for cohort opportunities. First select the cohorts of greatest interest and then peruse session titles to help jump-start the creation of your learning modules for each cohort.

Cohort Community Options

- ☐ New Hires
- ☐ Strategy Development
- ☐ Career Development
- ☐ *Other*
- ☐
- ☐ Management Skills
- ☐ Management Alternatives
- ☐ Pathways for Rising Stars
- ☐
- ☐

Curriculum Suggestions

Fundraising

- ☐ Identification and Qualification
- ☐ Warming Up to Cold Calling
- ☐ Planning Travel
- ☐ Storytelling
- ☐ Partnering with Academic Leaders
- ☐ Working with the President
- ☐ Making the Ask
- ☐ Gift Planning Essentials
- ☐ Finance for Fundraisers
- ☐ Business and Process Management
- ☐
- ☐
- ☐
- ☐

Management

- ☐ Management Essentials
- ☐ Leadership
- ☐ Talent Management
- ☐ Giving and Receiving Feedback
- ☐ Leading Change
- ☐ Diversity and Inclusion
- ☐ Difficult Conversations
- ☐ Onboarding New Talent
- ☐ Developing Talent
- ☐ Coaching and Mentoring
- ☐
- ☐
- ☐
- ☐

Source: Advancement Forum interviews and analysis.

Step 7: Integrate Learning into the Workflow

Equip Managers | **Diagnose Skill Gaps** | **Deploy High-Impact Skill Building**

Step 7

Time is a precious commodity for MGOs, so opportunities to embed effective skill-building into the workflow should not be overlooked by advancement and talent management leaders. What's more, a study by the Corporate Leadership Council concluded that on-the-job learning has been proven to provide three times the impact of traditional classroom learning.[1] This type of outcome should not be overlooked. On-the-job learning prompts immediate application of learned skills, embeds feedback on performance in real-time, and confirms the integration of knowledge.

This section provides tools and templates to deploy on-the-job learning following the examples of progressive institutions who have integrated learning into their workflow.

Tool Name	Description	Pages
Joint Visit Strategy Guide	Use the strategy guide to make clear the goals and roles of the participants in joint visits	69
Joint Visit Debrief and Learning Integration Guide	Use the debrief guide as a focused avenue for feedback following joint visits and to help incorporate lessons learned in subsequent visits	70
Real-Time Strategy Coaching Guide	Use the guide to institute prospect-based strategy coaching relationships between senior and junior fundraising staff	71
Crucible Role Picklist	Managers may use this list of recommended stretch roles to identify projects for advancement staff that promote professional growth, engagement, and retention	72

---

1) Corporate Leadership Council Human Resources, Corporate Leadership Council Talent Management Effectiveness Survey, CEB.

Source: Advancement Forum interviews and analysis.

Joint Visit Strategy Guide

Elevating a Traditional Practice to a Skill Building Workhorse

Instructions: Fundraisers working together should use this form in a pre-visit meeting to set tangible objectives and outline the role of each participant. After the visit, they should use the Joint Visit Debrief and Learning Integration Guide (p. 70) to determine whether these objectives were met.

Fundraisers: ____ **Joint Visit #**_____

Prospect Background Summary
(e.g., giving history, affinity, past interactions with advancement, wealth profile, etc.)

____

____

____

____

Skills to Be Developed
(e.g., relationship building, solicitations, etc.)

____

____

____

____

Goals for Visit and Role During Visit
(e.g., observe, start conversation, make the ask, etc.)

____

____

____

____

Other Notes

____

____

____

____

Source: Adapted from Missouri University of Science and Technology, Rolla, MO; Advancement Forum interviews and analysis.

Joint Visit Debrief and Learning Integration Guide

Promoting Feedback and Tracking the Impact of On-the-Job Learning

Instructions: After a joint visit, use this form to review progress of skill development, summarize achievement of pre-defined goals, and outline next steps for both participants.

Fundraisers: ____ **Joint Visit #**_____

Skills To Be Developed
(e.g., relationship building, solicitations, etc.)

____

____

____

Pre-defined Goals

____

____

____

____

What Went Well

____

____

____

____

Areas for Improvement

____

____

____

____

Next Steps
(e.g., another joint visit, role-play, etc.)

____

____

____

____

Source: Adapted from Missouri University of Science and Technology, Rolla, MO; Advancement Forum interviews and analysis.

Real-Time Strategy Coaching Guide

Coaching on a Prospect-by-Prospect Basis

Strategy Coaching in Brief

Fundraisers are paired with senior leaders in a formal mentorship program on a prospect by prospect basis which allows junior staff to gain exposure to top prospects and fundraisers, and extends the portfolio reach of fundraising leaders. This builds skills and competencies of fundraisers while increasing the number of prospects reached and total dollars raised, specifically in terms of principal gifts.

EAB

Real-Time Strategy Coaching

Building Skills Through Executive Sponsorship Programs

Advancement Forum

Senior Leader (CAO and AVPs)

- Fills "Partner" role
- Approves strategy
- Acts as face of organization in donor and faculty interactions

Development Officer (DO)

- Fills "Associate" role
- Develops strategy
- Acts as wingman in donor and faculty interactions

Two Ways to Initiate Real-Time Strategy Coaching

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

Download the real-time strategy coaching practice brief at **eab.com**

Source: University Hospital, Cleveland, OH; Advancement Forum interviews and analysis.

Crucible Role Picklist

Choosing Stretch Roles for More-Experienced Staff

Instructions: Fundraisers and managers should collaboratively select a development objective. Then, they should work together to select an activity from the choices below each development objective. Also consider other stretch roles that build skills related to an objective and fulfill an institutional need.

Increased Prospect Responsibility

- ☐ Run a mini-campaign
- ☐ Increase involvement in institutional readiness and planning phases of a capital campaign
- ☐ Run a strategic project designed to improve moves management process
- ☐ Lead a series of donor cultivation events
- ☐ Champion data collection on impact of philanthropy for donor case development

Leadership

- ☐ Act as a mentor for a new hire
- ☐ Proofread donor-facing documents for less-experienced fundraising staff
- ☐ Volunteer for a community service project through the university
- ☐ Present at a national conference or co-lead a webconference
- ☐ Lead a taskforce designed to solve a department or university initiative

Effective Communication

- ☐ Lead an orientation session for new hires
- ☐ Meet with faculty leadership to help them develop their ability to partner with advancement
- ☐ Write case for support templates for team
- ☐ Develop an educational session for the professional development curriculum
- ☐ Present learnings gleaned from Advancement Forum best-practice research or conference attendance

Strategy Development

- ☐ Pilot a new fundraising strategy, and, if successful, instruct team on how to replicate it
- ☐ Provide feedback on prospect strategy to less experienced fundraising staff
- ☐ Join advancement leaders during business planning or strategic planning sessions
- ☐ Provide feedback on colleagues' visit debriefs
- ☐ Lead prospect strategy meetings

Collaboration

- ☐ Work with donor relations to revamp donor retention strategy
- ☐ Work with development team to adapt and implement an Advancement Forum best practice
- ☐ Join an internal committee to improve staff engagement, professional growth, etc.
- ☐ Join an interdepartmental or cross-institution committee to resolve an organizational issue

Other:

☐ ____________________________________

☐ _______________________________________

☐ ____________________________________

☐ _______________________________________

☐ ____________________________________

☐ _______________________________________

Source: Advancement Forum interviews and analysis.

Step 8: Provide Practice Environments

Equip Managers | **Diagnose Skill Gaps** | **Deploy High-Impact Skill Building**

Step 8

In *Outliers,* Malcom Gladwell wrote about what he calls "the ten thousand rule." The ten thousand rule states that it takes 10,000 hours of practice to achieve mastery of a skill. On-the-job learning is a powerful tool to work toward building mastery among our frontline fundraisers, but it has one critical flaw: it runs the risk of an unpracticed, unprepared MGO making a misstep where the stakes are highest—in front of a donor.

To lower the stakes, the Forum believes that creating structured settings in which MGOs can practice are increasingly critical elements of any professional development program. Practice environments reinforce learning through the use of realistic situations that allow for focused repetition and practice. In addition to opportunities to practice, they should be designed with opportunities for self-reflection, coaching, and feedback.

This section provides tools and templates to help bring practice environments to life as a part of your professional development offerings.

Tool Name	Description	Pages
Case Study Session Preparation Guide	Managers should use this guide to prepare to host the first case study session and to communicate with the team	74
Case Study Summary Template	Provide this template to MGOs to complete as an outline to the case they will introduce during the session	75
Case Study Facilitation Guide	The case study session leader should use this annotated facilitation guide to conduct the session	76
Simulation-Based Coaching Toolkit	Run a simulation-based coaching session with this DIY toolkit	77

Source: Gladwell M., *Outliers: The Story of Success*, June 7, 2011; Advancement Forum interviews and analysis.

Case Study Session Preparation Guide

A Guide for Facilitators

Group Case Study Session in Brief

Case study sessions can be grafted onto existing prospect strategy meetings. The case study concept is adapted from the teachers' learning community model, in which teachers tackle real-life problems by working collaboratively to solve two to three in-depth case studies. The goals of the sessions are to move prospects along in the pipeline, and to build skills among MGOs in a safe practice environment.

Use the following steps to prepare for a focused case study session with your team.

Before the Session

Step 1: Issue the Call for Cases

Prospect research or MGO managers can issue the call for case examples. Cases should be selected on the basis that the scenario is general (i.e. could apply to a variety of prospects or MGOs) yet challenging and that it will provide the opportunity for the full team to learn in-the-moment.

Individual MGO managers can be asked to reflect on recent one-on-one conversations to isolate case examples and ask MGOs to complete the Case Study Summary Template (found on the following page), or the Template can be sent to MGOs to complete and submit for a current case they would like to discuss in an open-source process.

Step 2: Select Two to Three Cases to Use During the Session

The session facilitator should choose no more than three scenarios to discuss during the session. This scoping allows the team to get to the root of the problem and, as a team, generate a variety of solutions to employ for the presented case, and in similar instances in the future.

Step 3: Inform MGOs of the Selected Scenarios

If you put out a wide call for scenarios, remind MGOs that you will only present up to three cases in order to maximize sharing and learning. For MGOs whose scenario is selected, inform them that they will be asked to provide a two to three minute overview of their case, using the Case Study Summary Template, which they should have completed before the session.

Step 4: Set the Framework for the Case Study Session

Use the following language to help introduce the case study session as a part of an e-mail in preparation for the prospect strategy meeting:

Dear Colleagues,

I am looking forward to your participation in a case study session at the beginning of our next prospect strategy meeting. I will lead the session and will be asking [*insert the names of the selected MGOs who will share their cases*] to provide a top-line summary and two to three questions that they would like to discuss with the group. I'll provide ground rules and instruction for how we'll conduct this session as we kick it off.

Please let me know if you have any questions about the session, or about major gifts strategy in general. I look forward to working with you soon.

Sincerely,

[*Your name*]

Source: Adapted from Ithaca College, Ithaca, NY; Advancement Forum interviews and analysis.

Case Study Summary Template

Helping MGOs Kick-Start a Focused, Inquiry-Based Discussion on Shared Issues

Instructions: Have MGOs use this form to compile the information they will share on their prospects during the case study session. They should also use this information to prepare a two to three minute overview of the prospect and where they need help or are stuck.

Fundraiser Name: ____________________________ **Prospect Name:** ____________________________

Prospect's affiliation to the institution:
(e.g., grad year, degree and major, campus activities, parent, grandparent, friend, etc.)

____
____
____

Cumulative giving: _________________ Last gift: $_________________ Purpose: ______________________

Moves Management Stage:
Circle one

Discovery Qualification Cultivation Solicitation (within six months) Stewardship

Outline the steps taken with this prospect:

____
____
____

Overall thoughts on what those steps/interactions were like:

____
____
____

Outline where this prospect is stuck and to your best guess, why:

____
____
____

List two to three questions you wish to discuss with the team during this case study:

____
____
____

Source: Adapted from Ithaca College, Ithaca, NY; Advancement Forum interviews and analysis.

Case Study Facilitation Guide

Instructions: Follow the steps below to run a successful case study session as a part of your prospect strategy meeting.

Logistics:

- Ensure copies of the selected cases are provided to all participants.
- Make sure that the Ground Rules are visible to all participants at the start of the session—these can be written on a whiteboard or flip chart or provided as a handout.
- Set your timeline for each case and stick to it. Plan for two to three minutes for introduction of the case and no more than 10 to 15 minutes of question-based discussion on each case.
- Before the session, privately ask senior or more experienced MGOs to allow junior MGOs to jump in and ask questions first.

Day of the Session

Agenda Item	Instructions
I. Welcome and Case Study Ground Rules (2 minutes)	• The introduction to the case should be kept brief (no more than two to three minutes) • At the conclusion of the case introduction, the MGO presenting the case starts the dialogue with a question for the group on which they would like assistance • All dialogue during the discussion session should be question-driven • Relevant follow-up questions can be asked but no 'advice giving' is allowed • Everyone should view each other as learning resources
II. Case Presentation #1 (2 to 3 minutes)	• The MGO gives a high level overview of the case in their own words, and begins the conversation with a question to generate help from the attendees
III. Checklist for Questions and Reflection[1] The facilitator should be active in re-directing attendees when they don't follow question-based inquiry (15 minutes)	• Questions should be open-ended • No jumping to solutions before we frame the problem with questions • Everyone should participate in the questioning, so all voices are heard • Do we make and convey assumptions beyond what is being said? • Are we open to new ways of doing things? • Are new insights arising, and are we making connections with the diversity of questions and opinions being offered?
IV. Pull-Up of Next Steps and Lessons Learned (10 minutes)	• Next steps are concrete and actionable • Non-case presenting MGOs are encouraged to think about how this case applies to a current prospect and plan their next steps • In the early stages of conducting case work, also consider including time to evaluate the quality of the questions being contributed
V. Repeat steps II through IV	Once complete, move to the next item of business in your prospect strategy session.

---

1) Excerpted from Marquardt, M.J.; *Optimizing the Power of Action Learning: Solving Problems and Building Leaders in Real Time*, January 2004.

Source: Adapted from Ithaca College, Ithaca, NY; Advancement Forum interviews and analysis.

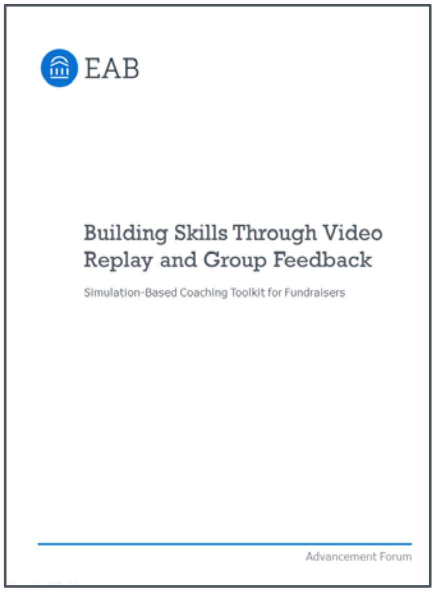
Simulation-Based Coaching Toolkit

Providing Multiple Feedback Avenues to Build on Strengths

Simulation-Based Coaching in Brief

Often, an individual's perception of their performance does not match their actual performance. Simulation-based coaching is a powerful activity that allows individuals to observe and reflect on their performance more objectively.

The Simulation-Based Coaching Toolkit contains resources to aid development leaders in training staff through video replay and group sharing.



EAB

Building Skills Through Video Replay and Group Feedback

Simulation-Based Coaching Toolkit for Fundraisers

Advancement Forum

Simulation-Based Coaching for Fundraisers Toolkit Contents

- Simulation-Based Coaching Logistics
- Facilitator Preparation
- Simulation Description and Agenda
- Conducting the Session
- Introduction to the Scenario
- Facilitator Discussion Guide
- Scenario Library
- Fundraiser Participant Packet
- Observer Packet
- Scenario Volunteer Actor Packet

Putting the Toolkit into Action

1 Training and Development

Managers can use simulation-based coaching to:

- Help fundraisers gain a better understanding of their strengths and development objectives
- Provide peers a forum to share feedback with colleagues on situations they would not typically witness
- Assist fundraisers in building skills and competencies

2 Hiring and Onboarding

Interviewers can use the Scenario Library and Observer Feedback Form to:

- Determine whether a candidate has the skills and competencies required to perform a job
- Inform recommendations for first-year training

Download the simulation-based coaching toolkit at **eab.com**

Source: Advancement Forum interviews and analysis.

EAB

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The Advancement Forum is grateful to the individuals and organizations that shared their insights, analysis, and time with us. We would especially like to recognize the following individuals for being particularly generous with their time and expertise.

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