



Managers Matter

Talent Management Strategies for Building Stronger Relationships with Direct Fundraising Reports

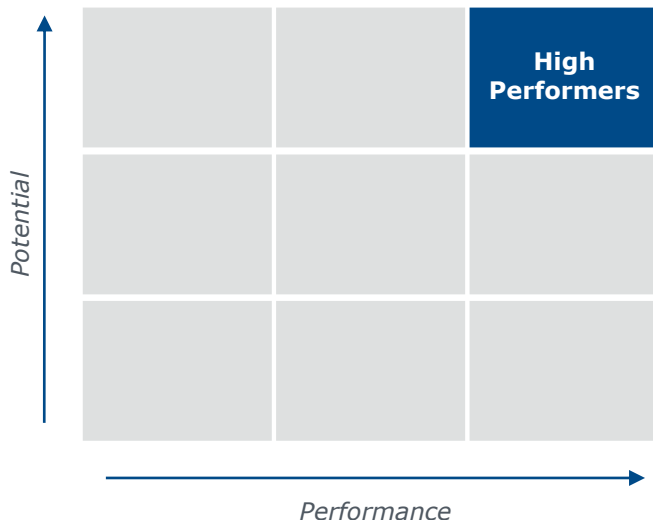
Advancement Forum

An Honest Look at How We View MGO Talent



Current Professional Development Efforts Target High Performers

Focused on a Limited Group



Haunted by the Status Quo

"I once had a successful campaign consultant say that 85% of MGOs are not good at what they do but the other 15% are superstars and you really have to focus your energy on them because they make or break campaigns.

I intuitively get that point, but it has haunted me because I don't think that relying on just 15% of our staff is what we should consider successful. So how do we get 50% or 100% of our staff to be successful?"

*Shaun Keister
Vice Chancellor for Development
and Alumni Relations
University of California, Davis*

Moving from a Glass Two Thirds Empty...

...To a Glass at Least Half Full

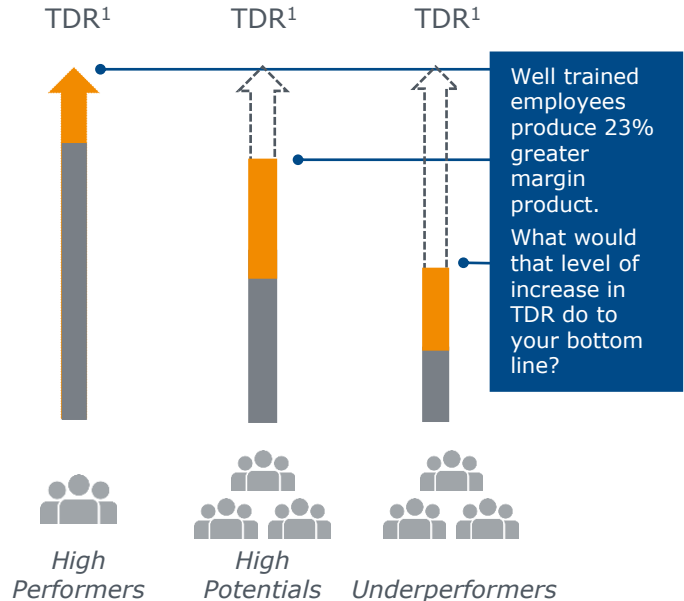
Realizing Untapped Potential

“We have to get more out of our existing people.”

*Keith Inman
VP of Advancement
University of Louisville*

“Even our most seasoned gift officers need to be more productive.”

*VP for Advancement
Private University*



Source: Konings J and Vanormelingen S, *The Impact of Training on Productivity and Wages: Firm Level Evidence*, Institute for the Study of Labor (2010), <http://ftp.iza.org/dp4731.pdf>; EAB interviews and analysis.

Too Little, Too Late

Investments in Talent Favor Acquisition

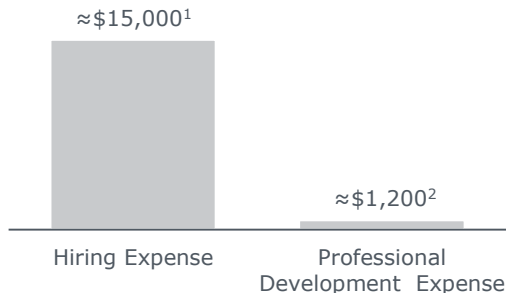
Waiting Until It's Too Late

"While nonprofits often plan 6-12 months in advance for recruitment of new employees, they often ignore professional development and career growth for current employees 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."

Monisha Kapila
Stanford Social Innovation Review

Annual Budget Allocated to Direct Hiring vs. Professional Development

Per employee, in dollars



25%

Of surveyed nonprofit organizations do not allocate a budget for training

2x

Amount that corporations spend on development as a percentage of budget compared to nonprofits

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

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

Recalling What Attracted MGOs in the First Place



Professional Development and Office Culture Top the List

Key Factors Impacting MGOs' Decision to Join Current Institution¹

EAB 2014 MGO Survey (n=1,217)

	Not Important	Important	Very Important
Professional Development	14%	43%	36%
Financial Compensation	18%	43%	34%
Office Culture	18%	37%	36%
Tuition Reimbursement	19%	11%	7%

1) MGOs asked: "How important were the following factors in your decision to join your current institution?"

The Case for a Different Approach to Growth

A Win-Win-Win

Impact of Professional Development



Fundraisers are more productive and stay longer...

- Professional development bolsters skillsets and leads to increased engagement
- Higher skilled workers are more productive
- Engaged fundraisers stay longer



...which means organizations raise more money...

- More tenured fundraisers raise more dollars than less tenured fundraisers
- Higher skilled fundraisers positively impact bottom line



...from donors nurtured by continuous, positive contact

- Fundraisers with strong cultivation and engagement skills form deep relationships
- Donors enjoy long-term relationships with their MGOs

1

Instilling Accountability for Professional Development

2

Diagnosing Skill Gaps

3

Deploying High-Impact Skill Building

An Emerging Trend

Setting Professional Development as a Strategic Priority



Treating Employees Like Donors

“Our talent management program is based on the foundation that we should treat our employees the way we treat our alumni and donors.”

*Brittany Wilhelm
Director of Operations and Project
Management
University of Denver*



Owning Responsibility

“The foundation of a talent management program is educating leaders that talent management is their responsibility. Leaders ultimately need to hold these crucial [career] conversations – communicating to their people that they are valued as individuals.”

*Tara Blythe, AVP of Talent
Management, Strategy and Planning
University of Florida*

Managers Make or Break Your Talent Strategy

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

Drivers of Engagement¹ Influenced by Managers

1. My manager stands up for the interests of my unit/department
2. My most recent performance review helped me to improve
3. My manager is open and responsive to staff input
4. My manager communicates messages that my coworkers need to hear, even when the information is unpleasant
5. My manager helps me learn new skills
6. I have helpful discussions with my manager about my career
7. I receive regular feedback from my manager on my performance
8. My manager helps me balance my job and personal life

”

“Premature departures of fundraisers can be traced to poor relationships with immediate managers.”

*Path to the Profession
CASE Currents 2012*

”

“All the calls I get from people who want jobs are calling because they have complaints about their current managers.”

*University Foundation President
Research University*

1) Advisory Board Company Survey Solutions Employee Engagement; 24 total drivers of engagement; eight of ten related to manager effectiveness

Yet, Many Managers Lack Core Skills

Promotion is Achieved By Excelling at Fundraising...Not Management

The Fastest Runner Becomes the Coach

“One of the primary leadership challenges in advancement is that we often promote high-performing fundraisers into management positions, without providing them appropriate training and coaching to develop the essential management skills they often lack.”

*David Unruh
SVP for Institutional Advancement
Drexel University*

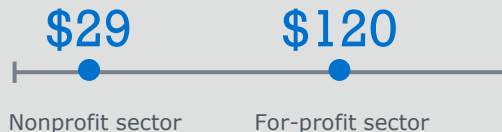
The Need for Strong Teachers

“We need to make sure our managers are not only competent fundraisers, but teachers at heart who engage in holding effective conversations, sharing feedback, and coaching their direct reports.”

*Missy Ryan
Senior Director of University Development
Clemson University*

Few Resources Dedicated to Manager Development

Per-person spending on leadership development



57%

Of fundraising directors had no training before assuming their first management job

Source: 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; Burk P, "Too Busy Leading to Learn How to Lead," March

24, 2014, <http://www.cygresearch.com/burksblog/donor-centered-leadership/leadership-training-723/>; EAB interviews and analysis.

Comparing Manager to Non-Manager Competencies



Senior MGO and MGO as Manager Capabilities Not Equal

Rank Order of the Top Six Competencies of Top-Performing MGOs¹

Managing MGOs

Rank	Competency
1	Integrity/Credibility
2	Drive for Results
3	Emotional Intelligence
4	Professionalism
5	Adaptability
6	Effective Communication

Non-Managing MGOs

Rank	Competency
1	Stakeholder Focus
2	Drive for Results
3	Mission Driven
4	Collaboration
5	Effective Communication
6	Strategic Thinking/Execution

45%

MGOs managing
other staff

2.5

Average number of staff each
managing MGO manages



1) Out of 17 total competencies, Top-Performing MGOs asked: "Rank the top 10 competencies that contributed to their success."

Developing Constructive Conversations

Training at King's College London Focuses on How to Deliver Feedback

Feedback is Fundamental

"Feedback in the workplace is fundamental for helping those who wish to improve performance, reach an objective, or avoid unpleasant reactions to their efforts. Without feedback, how could we test the reality of our perceptions, reactions, observations, or intentions?"

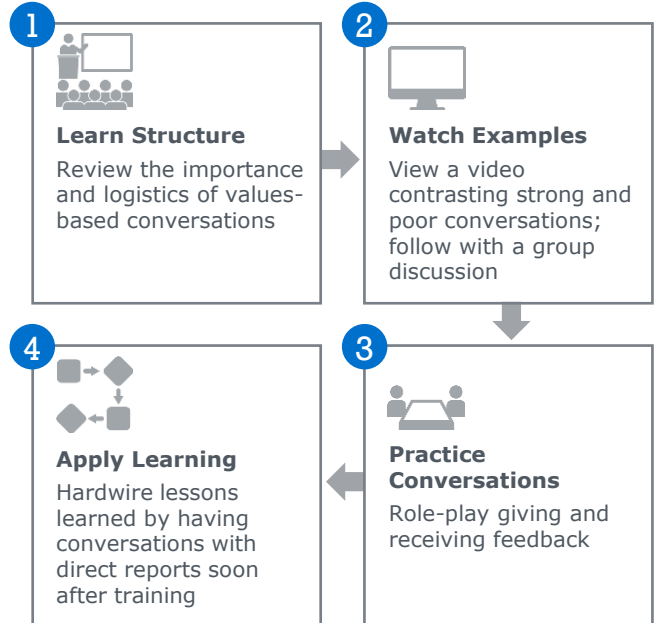
Charlie and Edie Seashore, NTL Institute

A Pillar of Relationships

"As a manager, feedback is one of your main tools – if you don't sharpen it, you're not going to have a strong relationship. Both the manager and the fundraiser lose out."

VP of Development, Public University

Feedback Training Session Process



97%

Of the advancement team at KCL strongly agree or agree that their feedback and ideas are valued by their managers

Introducing a Tool of the Trade

Helping Managers and Employees, One Conversation at a Time

Talent Review Form and Probing Questions Jumpstart Dialogue



The graphic shows a document titled 'Talent Review & Career Development' from the University of Florida. It lists five categories: Professional Background/Current Career Progression, Current Responsibilities/Position/Competencies - Likes & Strengths, Challenges & Preferred Leadership/Supervision Style, Future Responsibilities/Position/Competencies, and Areas for Professional Growth. Blue lines connect each category to a corresponding question example on the right.

UF UNIVERSITY of FLORIDA

Talent Review & Career Development

Professional Background/Current Career Progression:

Current Responsibilities/Position/Competencies - Likes & Strengths:

Challenges & Preferred Leadership/Supervision Style:

Future Responsibilities/Position/Competencies:

Areas for Professional Growth:

Question Examples

What do you like about UF/your department/your role? I see your strength as ___. Would you agree with that? What other strengths help you do your job well? What do you see as your skill gaps?

Is there a process/procedure that makes your day-to-day difficult? Other roadblocks?

Everyone likes to be managed differently, what style do you work best with? How can I better support you?

What's the next step in your career path? Where do you see yourself in 1 year, 5 years, 10?

What do you feel are your self-assessed gaps in knowledge, skill, ability? What information would you like to master that will give you confidence to reach your goals?

Put MGOs in the Driver's Seat

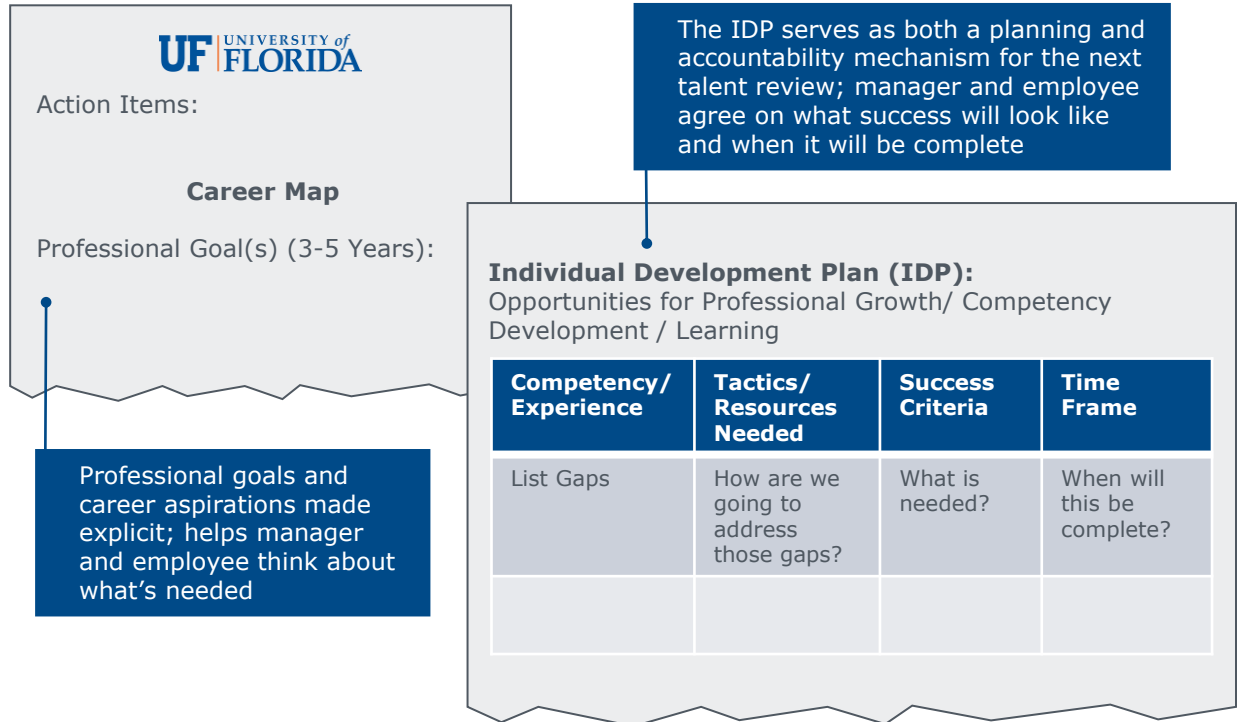
"What Do You Need to Become a Better Fundraiser?"

“Ownership of professional development between fundraisers and managers should be 50/50. It can't simply be top down. Employees have to take a stake in this. They need to ask for professional development. At the same time, managers and organization have to ask about employee interests and offer opportunities that align individual and institutional goals.”

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

Co-Authoring a Career Map

Action Steps and an Individual Development Plan Codify MGO Aspirations



Harnessing the Power of the Group

Supporting Managers with Learning to Cohort-Style Learning



Traditional Group Sessions

One and Done

Lack of a continuous learning process leads to large knowledge leak

Unfocused

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

Not Interactive

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



Cohort Learning Communities

Multiple Touch Points

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

Targeted

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

Collaborative

Members continuously interact with each other through the learning process

Facing Learning Challenges Together

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

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



Beyond Closing Gifts and Building Frontline Staff



Don't Neglect the Keys to Your Talent Strategy

Cohort Coursework for Managers



Management Skills

New managers and managers that need refreshers in management skills



Management Alternatives

MGOs interested in strengthening their fundraising, rather than management skills



Pathways for Rising Stars

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

General Elements of Cohorts

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

“CFO asks CEO: “What if we invest in developing our people and they leave?”

CEO: “What if we don’t and they stay?”

Peter Baeklund
Resourceful Leadership

1

Instilling Accountability for Professional Development

2

Diagnosing Skill Gaps

3

Deploying High-Impact Skill Building

Look Before You Leap

Bypassing Skill Gap Diagnosis Wastes Resources and Misdirects MGOs

Outcomes of an Unfocused Approach



Manager Disconnect

Without understanding MGO skills gaps and strengths, managers are unsure of how to focus career and professional development discussions



Misspent Dollars

Advancement shops use vendors and conferences without first determining how training supports individual or organizational goals



Loss of Time

Conferences and group training takes MGOs off the road, even though these initiatives may not align with what they want or need



Lack of Focus

MGOs continue with their daily tasks without knowing which skills to build or hone, and which professional development initiatives to attend



“Right now, we see a lot of organizations doing what I call ‘spaghetti’ professional development. We throw a lot of things out there and hope something sticks.”

*Missy Ryan
Senior Director of University Development
Clemson University*

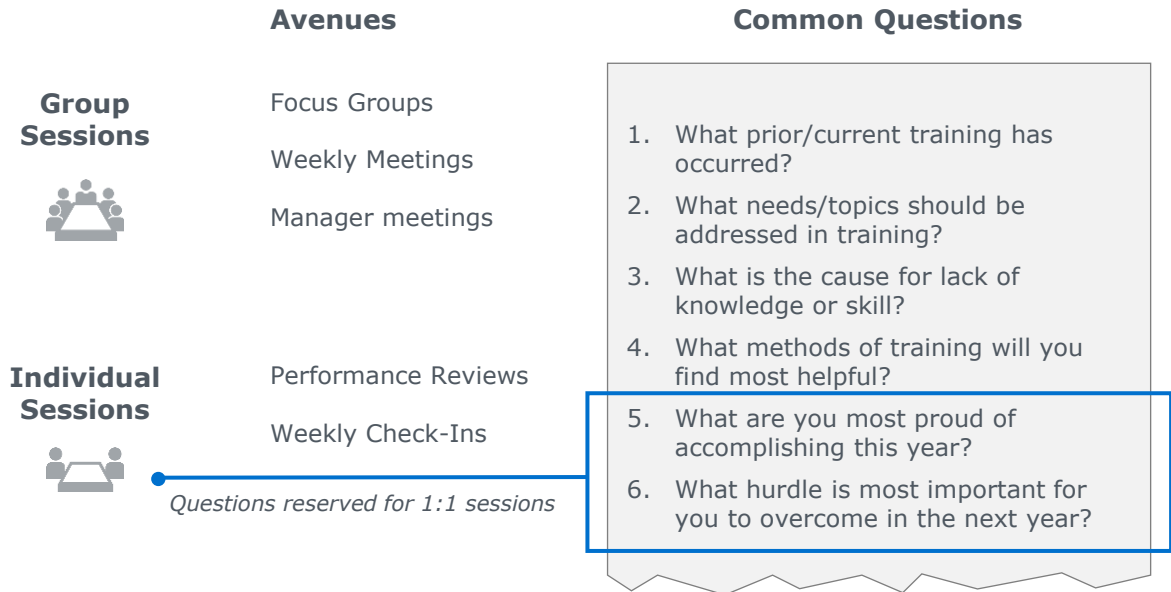


“Professional development is reactive rather than proactive. It is whatever lands in your inbox that you think might be good to attend.”

*Tasia Neeve, VP for Advancement
Golden Gate University*

Digging to the Root Cause

In-Person Sessions Provide Greater Clarity on Key Questions



Start with the Easy Questions

A Quick Survey Surfaces MGO-Identified Needs and Wants

Example Survey Questions

1. What skills would you like to develop?
2. What trainings would you like to attend? →
3. How many years of experience do you have?
4. What type of fundraising training have you already completed?

“You cannot implement any human capital strategy without listening to what people have to say.”

Jon Derek Croteau
Author
The People First Approach

Louisiana State University Foundation Topic Poll

Please rank the following topics in order of most critical/important as it relates to your development needs, with 1 being the most critical topic and 9 the least critical.

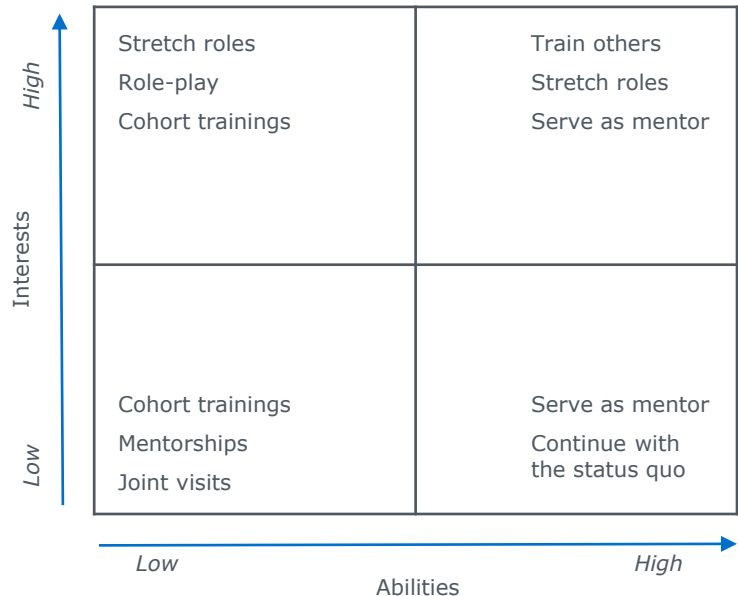
1. Planned Giving For The Non-Planned Giving Officer
2. Closing Smarter: Strategies For Major Gift Solicitations
3. Fundraising Essentials: Perfecting Moves Management
4. Endowment Fundraising
5. Transitioning Donors to Higher Gift Levels
6. Leadership Annual Giving Societies: Bridging to Major Gifts

Finding Skill-Building Sweet Spots

MGO-Created Interest Maps Help Direct Training Initiatives

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



Using What You Already Have

A Close Look at Strategy-Centered Work Products Exposes Skill Gaps

Benefits of Strategic Work Product Analysis



Core to Central Strategy

Advancement leaders choose work products that test and highlight common and important skills



Surfaces Potential Trainers

Gift officers with exemplar work products are often chosen to lead training sessions or mentor gift officers



Produced On the Job

Work products provide consistency for evaluation and do not add to existing workloads



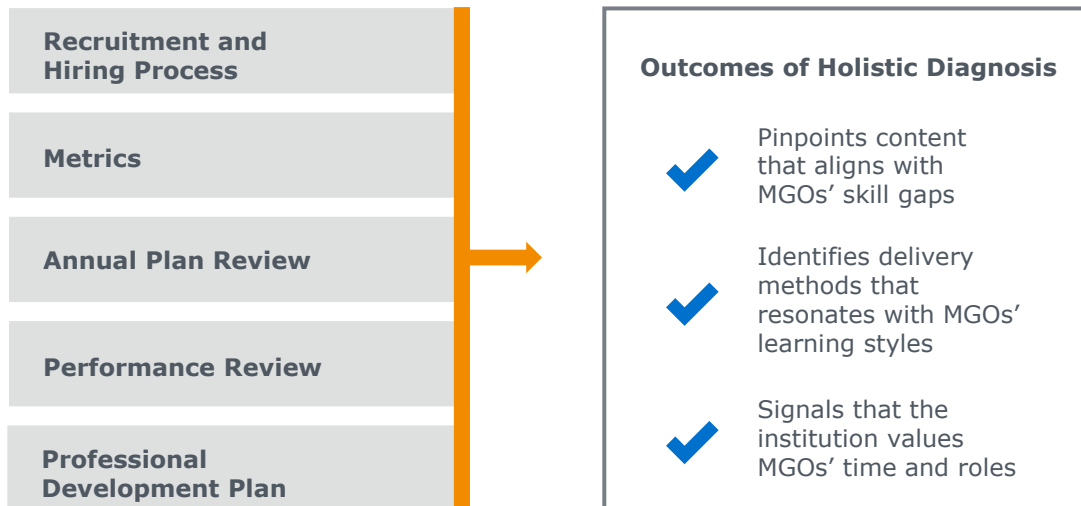
Provides Easy Feedback Avenues

Managers can easily point to problem areas on work products and suggest ideas for improvement



Synthesizing the Art and the Science of Diagnosis

A Five-Prong Approach Offers 360° Vision Into MGO Skill Gaps



“I’m a big believer that if my team is high-performing, sustainable, and accountable we will raise more money. So, I put more of my time in the talent management space.”

Kathy Drucquer Duff, Assistant Vice Chancellor of Development, UC San Diego



1

Instilling Accountability for Professional Development

2

Diagnosing Skill Gaps

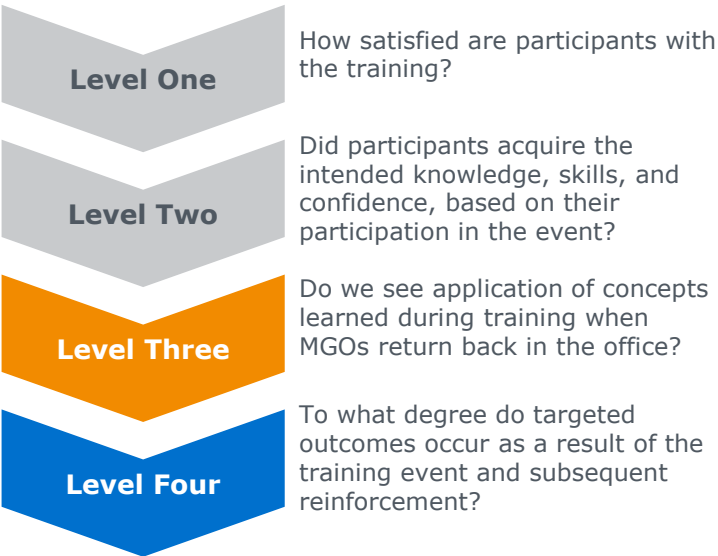
3

How Managers Support the Skill Building

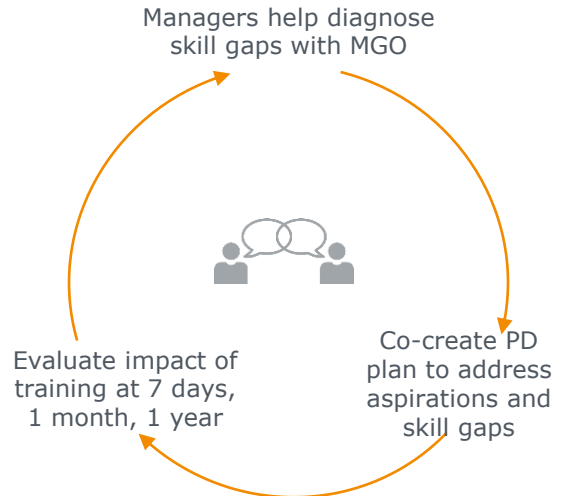
Measuring Beyond Satisfaction

Closing the Loop by Measuring Learning, Behavior, and Results

The Kirkpatrick Model of Evaluation



Managers Best Equipped to Measure Levels Three and Four



Making Better Use of Traditional Training

Four Ways to Improve What You Already Do

Traditional Trainings

- 1 List of One-Size-Fits-All Onboarding Tasks
- 2 Classes, Conferences, and Webinars
- 3 Joint Visits
- 4 Stretch Roles



Enhanced Trainings

- Flexible Onboarding Matrix
Iowa State University Foundation
- Continuous Learning Touch Points
University of Michigan
- Targeted Joint Visits
Missouri University of Science and Technology
- Crucible Roles
University of Waterloo & Washington University

A Flood of Wasted Information

One-Size-Fits-All Onboarding Misses the Mark



Inexperienced Gift Officer

Resume

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



Experienced Gift Officer

Resume

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

Onboarding Plan

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

Delayed Starts

90

Days necessary to be ready for the road

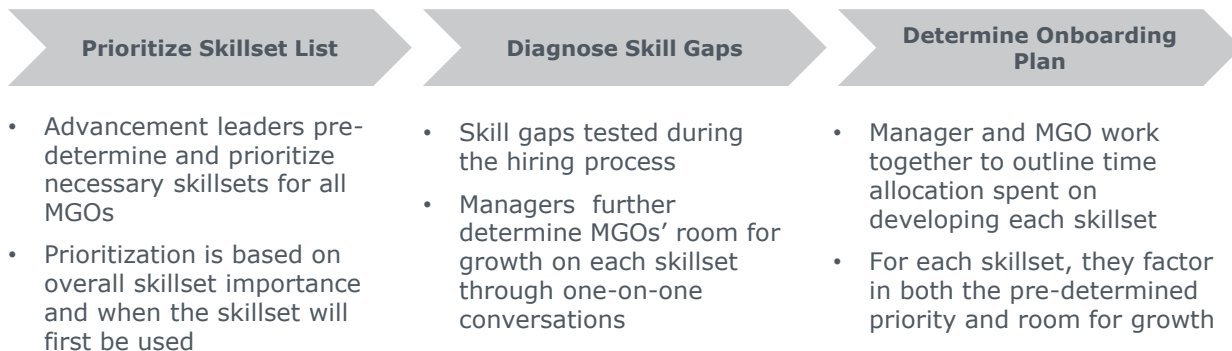
1st

Gift is only secured by the end of one year

Customizing Onboarding

Flexible Process Allows MGOs to Focus On Key Skillsets

Iowa State University Foundation's Pre-Onboarding Steps



Example Onboarding Plan

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

Meaningful Enhancements for Current Activities

Ongoing Learning Touch Points Reinforce Learning

Getting the Most Out of Classes, Conferences, and Webinars

Before



Pre-Conference
Form



Ongoing
Conference Value
Database



Manager
Discussions

During



Worksheets



"Lunch and Learn"
Guides



Interactive
Discussions or
Hands-On Learning

After



Post-Conference
Form



Post-Conference
Share-Out



MGO Homework
and Key Takeaways
for Managers

Solidifying Skill Integration

Post-Class Action Steps Prompt Discussions on Learning Outcomes

University of Michigan Post-Training Process

Homework for MGOs

Session: Visits and Donor Engagement

- READ _____
- REFLECT _____
- ACT _____



MGO



Manager

Key Takeaways for Managers

Prompts for Follow-up Questions

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

Sparking Professional Development Conversations

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

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



Learning While Doing

On-the-Job Skill-Building Reinforces Learning

Benefits of On-the-Job Learning



Works with MGOs' busy schedules



Prompts immediate application of skills learned



Embeds feedback in real-time



Confirms integration of knowledge



Beyond Theory, Beyond Practice

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

*Anita West, VP for Advancement
University of Redlands*



Tripling Impact

3x

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

Bringing Training as a Carry On

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



Pre-Visit

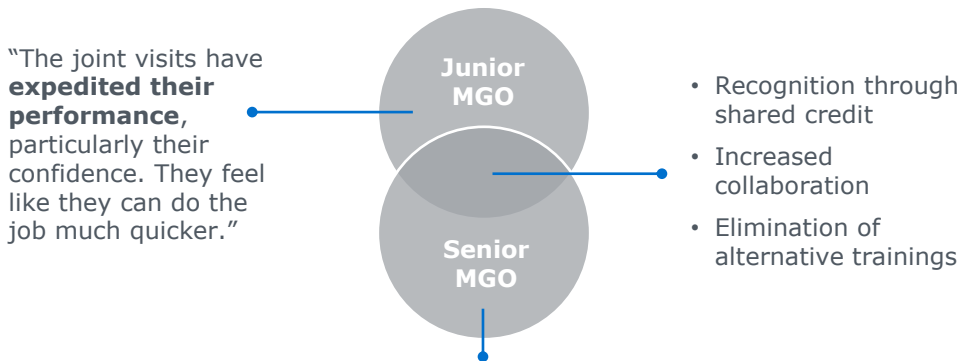
- Review prospect or donor background and profile
- Outline skills that MGO seeks to build
- Determine role of MGO during meeting
- Strategize and prepare a visit plan

Post-Visit

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

Incentivizing MGOs to Say “Yes”

Overlapping Benefits Prompt Active Participation in Joint Visits



Recognition on Performance Reviews

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

Borrowing from a Known Partnership Model

Law Firm Model Builds Skills through Real-Time Coaching

Two Executive Sponsorship Approaches at University Hospitals

1 Development Officer (DO) Owns Prospect Relationship

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

2 Senior Leader Owns Prospect Relationship

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



Minimizing Senior Leader Time While Maintaining Senior Leader Presence

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

Sherri Bishop, Chief Development Officer, University Hospitals

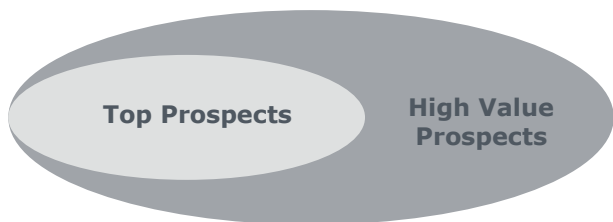
Increasing Reach and Revenue

Wider Focus Captures More High-Value Prospects

Prospects Reached Under Shared Model

Reached in a year *without*
DO assistance

Reached in a year
with DO assistance



Accelerated Performance

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

*Sherri Bishop, Chief Development Officer
University Hospitals*



Anticipated Increase in Dollars

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

Top Talent Have Outsized Impact and Separate Requirements

Needs of Top Performers

“

Amy Bronson, Boston University

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

25%

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



Effective use of high-value time



Interaction with nuanced content



Increase recognition and options for growth



Opportunities to challenge and strengthen skills



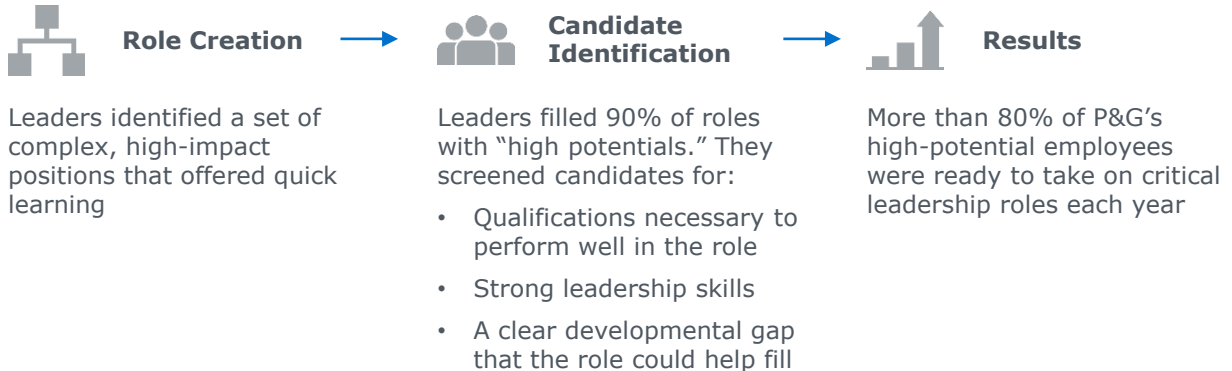
71%

Of employees said that stretch assignments unleashed their potential

“Baptism by Fire”

Procter & Gamble Develops Top Talent With Crucible Roles

Procter & Gamble Process



Leaders Emerge Through Accelerator Experiences

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

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

Choreographing a Meaningful Crucible Moment

Waterloo Uses One-Time Assignments to Solve Organizational Needs

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

Finding Leaders

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

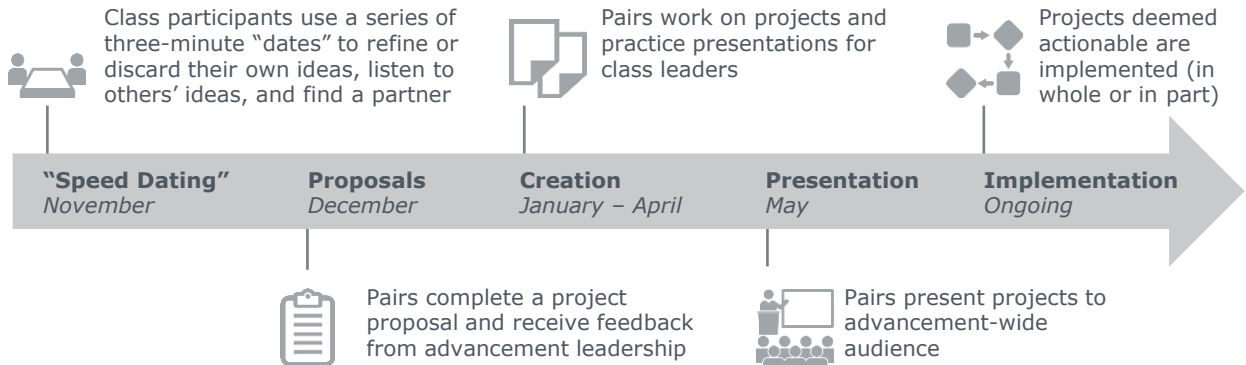
Mike den Haan, AVP of Principal Gifts, University of Waterloo



From Ideas to Concrete Action Steps

Intensive Active Learning Improves the Organization

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



Learning to Execute High-Value Projects

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

Mark Lanum, Director of Donor Services, University of Washington



Have Your Cake and Eat It Too

Project Impact is Multi-Layered at University of Washington

Impact on Organizational Needs

Research conducted on a variety of organizational needs

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

Select projects implemented, based on projected outcomes and staff capacity

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

Impact on Employee Engagement

Members of ALC class are retained at a high rate

>5%

Turnover rate for class graduates

Member of ALC class are promoted at a high rate

60%

Promotion rate for class graduates

48%

Standard promotion rate

Managers at the Center

Realizing Gains in Retention, Productivity, and Skill Building



- ✓ Tools and training for managers improves their ability to effectively work with and develop the talent that reports to them
- ✓ Direct reports feel that the organization and their manager is invested in their individual development
- ✓ Employees understand how their efforts support the goals of the organization
- ✓ Training and increased engagement driven by targeted training and manager-direct report communication impacts tenure and productivity

To Access Tools and Related Resources visit EAB.com and Search for The Professional Development Toolkit

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Welcome Katie Stratton Turcotte

EAB / Research / Advancement Forum / The Professional Development Playbook


Katie Stratton
Turcotte
Practice Manager

The Professional Development Playbook

A toolkit to target skill building and maximize advancement staff performance

Toolkit | August 01, 2016

Advancement shops work hard to train their fundraisers when they're first hired—and then stop. 79% of the MGOs we interviewed for our [Gifted and Talented](#) research project rated professional development as an important or very important factor in their decision to join their current institution, but most professional development opportunities stop at the end of onboarding.

To prevent their MGOs from leaving, advancement shops need to provide continuous and ongoing opportunities for professional development. This toolkit and the related resources have been designed to help chief advancement officers and directors of strategic talent management develop and refine existing professional development programs to ensure that they include three imperatives:

- Equip managers
- Diagnose skill gaps
- Deploy high-impact skill building

Click on each imperative to learn more about the how to include it in professional development opportunities, and the tools to help you do it. You can either download the full toolkit or each tool individually.

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