



Top 100 Leaders Roster

Pinpointing and Prioritizing Tomorrow's Key Volunteers

Advancement Forum

Project Director

John Tannous

Contributing Consultants

Diana Barnes

Practice Manager

Katie Stratton Turcotte

Managing Director

Liz Rothenberg

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Top 100 Leaders Roster

Pinpointing and Prioritizing Tomorrow's Key Volunteers

Practice in Brief

The "Top 100 Leaders" list leverages staff perspectives on volunteer effectiveness and other contextual data to develop a condensed roster of "must-engage" alumni, for whom a specific volunteer manager is appointed to develop a medium-term career path for that volunteer.

Rationale

The life-loyal donors, stalwart advocates, and community champions who sit on boards and councils across the university are critical to development goals and larger institutional objectives. But the replenishment of this top layer of volunteer leadership in the coming decade is uncertain in an era when mid-career alumni are underengaged and attracted to many causes outside the university. This strategy takes a talent management approach to volunteer leadership development: synthesizing data from several sources to recognize leaders-in-waiting, positioning a select number for high-profile roles, and assigning staff accountability to cultivate those individuals as volunteers in the short- and long-term.

Implementation Considerations

This practice has four steps:

1. Secure Buy-in of Advancement Leadership
2. Request Internal Nominations and Ratings of Volunteers Across Campus
3. Hold Internal Reviews to Cull the List to Top 100 High-Potential Volunteers
4. Assign a Volunteer Prospect Manager to Develop a Plan to Engage Each Leader

Resource Considerations

Mere development of the list (steps one, two and three) will generate valuable insights and speed-to-consensus around which volunteers to prioritize for leadership roles. The only cost of these steps is the time of the staff member who coordinates and prepares the materials and of the senior leaders who join meetings to cull the list.

Step four adds the most time, but can be positioned as a long-term goal. Ultimately, dedicated Volunteer Prospect Managers will spend a substantial amount of time on this initiative depending on how many alumni leaders they are assigned to engage, but this is presumably incorporated into their roles.

Profiled Institution:

McGill University in Montreal, Quebec, Canada

Very Important Volunteers

McGill University applies a talent management approach to volunteers. That approach includes formal designation of high-potential volunteers, which allows for proactive and efficient succession planning across major leadership roles. They have created a Top 100 list of promising early-stage volunteers mainly in their 30s, 40s, and some in their early 50s. Application of formal protocols to create the list brought many “under the radar” high-potential alumni volunteers to staff attention and galvanized leadership consensus around their prioritization, making it easier to create volunteer career paths for them in the future. Now the list is their go-to source for filling leadership vacancies and for tapping volunteers for various assignments.

This initiative grew out of a pilot program in which they closely managed the advisory board and other leadership roles in their engineering school using this strategic and intentional approach. Through carefully selection and pathing of leaders for different roles, they created a high-functioning advisory board, realized major gifts from several engaged volunteers, and even elevated engineering volunteer leaders to the university governing board. Because of the success observed in this unit-level pilot, McGill decided to formalize this practice at a university-wide level.

McGill University Formally Designates and Tracks High-Potential Volunteers



Purpose

To identify and career path high-potential leaders to increasingly responsible volunteer roles and to offer a structured education in the governance of the institution

Key Steps for Creating the List

- 1 Secure buy-in of advancement managers on the importance of volunteer and leader pipeline development
- 2 Solicit nominations from deans, unit development staff, and senior advancement leaders using clear criteria, including capacity and demonstrated effectiveness as a volunteer
- 3 Conduct several meetings with the senior leadership team to review the list line-by-line and cull it to 100 alumni
- 4 Assign individuals to a Volunteer Prospect Manager who identifies next steps for volunteering and crafts overall Volunteer Management Plan
- 5 Revisit and update list regularly every two to four years

Source: EAB interviews and analysis.

Step 1: Secure Buy-in of Advancement Leadership

The chief advancement officer's sponsorship of this initiative, inclusive of participating in related meetings and sending communications under his or her name, is critical to garner compliance across the division and the university. Deans and development officers may not feel compelled to participate in an effort driven primarily by the alumni relations function, believing it is peripheral to their immediate motivation of securing private support from donors. The CAO's involvement might also be necessary to smooth politically-sensitive issues about volunteer prioritization across academic units.

However, the CAO can delegate coordination of the process itself to another staff member perceived as an objective "honest broker." Possibilities include:

- his or her executive assistant;
- existing mid-level staff across frontline fundraising and engagement or advancement services as a stretch role;
- a part-time, temporary, or contract engagement by a retired but beloved emeritus staff member.

To commence the process, a version of the memorandum shown below was sent to all advancement leadership staff.

Sample Memorandum Sent to Advancement Leadership Team

To: Advancement Leadership Team
From:
Date:
Subject : Volunteer Leadership Assessment

As part of Development and Alumni Relations' strategic plan, we are looking to move towards a talent management approach to the advancement, promotion, and deployment of volunteers. This effort will enable [INSTITUTION] to build and support a robust pool of volunteers, identify and engage the next generation of volunteer leaders, establish volunteer career paths, and assist in effectively positioning our volunteer resources.

As part of this effort, we are launching a program of annual reviews of key volunteer leaders, assessing the degree to which they are engaged and effective, as well as their commitment to advancing the philanthropic goals of [INSTITUTION]. The sessions that have been scheduled for [DATES] are the first effort at systematically identifying [INSTITUTION]'s next generation of volunteer leaders.

These initial sessions will focus volunteers actively serving on one the following general categories of volunteer group:

- School and college advisory boards
- Campaign volunteers, such as regional committees and campaign cabinets

A follow-up session focusing on the alumni association and associated volunteer roles will be scheduled, in conjunction with alumni association staff, at a later time.

The review sessions will be similar to prospect reviews: individual names will be reviewed, along with current and past volunteer service, giving history, and in many cases, input from appropriate DAR staff who have insight into volunteer capacity. Staff will be asked to evaluate volunteers according to several guidelines, which you will find attached to this email.

This information, as well as the details on each volunteer's current and past committee service and philanthropic support for [INSTITUTION] (including identifying those who are among [INSTITUTION]'s \$1M+ donors), will allow for a systematic review of volunteer service, with the following outcome goals for the sessions:

- Identification of a pool of "Top 100" volunteer leaders to be the initial group under active talent management;
- Recommendations for potential career paths for leaders whose terms are expiring;
- Identification of open leadership positions to fill in next 18 months, and potential candidates for these positions.

Source: Adapted from with permission from McGill University, with gratitude to Royal Govain; EAB interviews and analysis.

Step 2: Request Internal Nominations and Ratings

To collect submissions, the following memorandum was sent to deans, unit development directors, and other senior advancement leaders. Each was personalized to include an attachment of a spreadsheet with the names of every volunteer under their direction, with names pulled from the advancement CRM on existing leadership roles and programs. They were also asked to nominate any others that the data pull did not capture, or that are not formally under their management or that they interact with substantially.

Sample Memorandum Sent to Advancement Staff and Academic Stakeholders

Dear [COLLEAGUE NAME],

As part of Development and Alumni Relations' strategic plan, we are looking to move towards a talent management approach to the advancement, promotion, and deployment of volunteers. This effort will enable [INSTITUTION] to build and support a robust pool of volunteers, identify and engage the next generation of volunteer leaders, establish volunteer career paths, and assist in effectively positioning our volunteer resources.

As part of this effort, we are launching a program of annual reviews of key volunteer leaders, assessing the degree to which they are engaged and effective, as well as their commitment to advancing the philanthropic goals of [INSTITUTION]. In six weeks, the Development and Alumni Relations senior management team will be reviewing information on the volunteers' work at [INSTITUTION]; your input into this process is important and would make the review more complete. I am writing, therefore, to request your feedback on the volunteer group(s) you manage. Your feedback is requested by [DATE].

Realizing that this timeframe is tight, we have tried to make this process as quick and easy as possible— it should take about 15 to 20 minutes. In addition, because this is the first time we have ever undertaken such a large-scale, systematic evaluation of volunteer leadership at [INSTITUTION], the process is not a perfect one: your thoughts on this important work will also be appreciated.

We have provided attached a spreadsheet that includes active volunteers in group(s) with which you are associated (all data pulled from [CRM]). Please review that for comprehensiveness, include other groups and individuals with which you interact that we may have missed, and include previous or former volunteers you found excellent and that you consider viable candidates for future roles. Then, please take a few minutes to complete the following, filling your responses directly into the body of the table:

1. Provide score for each volunteer, based on the following scale:
 1. **Top performer:** Regularly and proactively engages in advancing [INSTITUTION].
 2. **Engaged and effective volunteer:** Attends and participates regularly in meetings; advocates effectively on behalf of the school.
 3. **Moderately engaged volunteer:** attends and participates in meetings occasionally; provides some advocacy on behalf of the school.
 4. **Ineffective volunteer:** does not attend or participate in meetings; does not advocate on behalf of the school.
2. **Y/N** Is [INSTITUTION] a top philanthropic priority for this volunteer?
3. **Y/N** Would you recommend this volunteer for continued service, including advancing into more responsible positions of volunteer leadership within [INSTITUTION]?
4. Please place a check mark in column four if the volunteer's term of service is expiring in the next 12 months, or has expired in the past 12 months.
5. **OPTIONAL:** Feel free to add additional information that might be helpful, including updates you would like made to their CRM records. We would be happy to make them with your submission.

Please feel free to contact me with any questions. Thank you for your feedback.

Source: Adapted from with permission from McGill University, with gratitude to Royal Govain; EAB interviews and analysis.

Step 3: Hold Internal Reviews to Cull the List

Internal Review Process

- 1** The staff member assigned to coordinate this process sorts all volunteers into A, B, or C categories based on initial review using objective criteria determined in consultation with the chief advancement officer or other senior advancement leader:
 - A = outstanding volunteer, should be in pool of top 100
 - B = strong volunteer, should be considered for pool of top 100
 - C = not a strong volunteer, should not be considered for pool of top 100
- 2** The staff member then consolidates the spreadsheets into one easily sortable list to review and discuss. To the extent possible, the following information should be pulled into the document so that reviewers can easily create a volunteer profile.

Every volunteer profile includes:

 - degree(s), academic unit of graduation, and date of graduation
 - current volunteer or leadership service
 - past volunteer or leadership service
 - lifetime giving
 - most recent gift amount, date, and designation
 - capacity and affinity ratings (where available)
 - scores provided by stakeholders (where an individual was reviewed multiple times by overlapping parties, all scores were included)
 - current prospect manager, if someone is assigned
- 3** Senior advancement leaders then conduct a series of meetings to review the lists and narrow the list of top volunteer leaders to 100 names.

Each meeting might include discussion of all the individuals associated with particular volunteer leadership organizations or groups. Depending on the number of individuals under discussion, each meeting may last one to two hours. The initial A, B, and C scores help leaders to prioritize which volunteers are worth their attention and which can be skipped for discussion: generally, the process consists of approving A's and C's as designated, then of upgrading and downgrading B's to A or C. Where they disagree with the A or C rating, they have opportunity to take issue during the meeting.

Then, in one final meeting at the end, they cull down the list from the final A's from across those meetings to arrive at no more than 100 A's.

Sample Volunteer Review Session Meeting Agenda

1. Explanation of session goals

- Identify a pool of “Top 100” volunteer leaders to be the initial group under active talent management;
- Make recommendations for potential career paths for leaders whose terms are expiring;
- Identify open leadership positions to fill in next 18 months, such as the Advancement Leaders Council.

Note that in working towards these goals, we will strive to be consistent with one of DAR’s strategic plan objectives, which is to ensure that the university’s volunteer leadership is reflective of the demographics of **[INSTITUTION]**’s alumni community as a whole. Therefore, following the review sessions, we will cross-reference the demographics of not only the existing pool of volunteers but also the “Top 100” mentioned above, to see if that pool is line with the demographics of the alumni community as a whole.

These steps will allow us to put into place a five-year plan to recruit and promote volunteers in such a way that, over time, the volunteer leadership is reflective of the **[INSTITUTION]** alumni body more generally.

2. Explanation of review process

Volunteers were given one of three scores based on **[CRITERIA USED]**:

- A = outstanding volunteer, should be in pool of top 100
- B = strong volunteer, should be considered for pool of top 100
- C = not a strong volunteer, should not be considered for pool of top 100

3. Overview of DAR volunteer groups: total groups and active membership

4. Review of volunteers

Groups that will be reviewed in today’s session: ____, ____, and ____

Groups that will be reviewed on **[DATE]**: ____, ____, and ____

Groups that will be reviewed on **[DATE]**: ____, ____, and ____

Groups that will be reviewed on **[DATE]**: ____, ____, and ____

Step 4: Assign Staff to Develop Plan to Engage Leaders

Once the Top 100 volunteer list is finalized staff assign each individual a Volunteer Prospect Manager (VPM), a staff member assigned in the advancement CRM responsible for tracking and enabling the alum's involvement. The VPM is then asked to create a volunteer management plan, akin to an individual development plan (IDP), for long-term engagement.

One key aspect of a volunteer management plan is to provide a diverse and interesting experience to high-potential volunteers. In an effort to create well-rounded leadership volunteers who are not loyal only to parochial and siloed interests, but to McGill as a whole, VPMs seek to rotate them across assignments in various academic units, central administrative areas, and in both on-campus and regional roles.

Budget cuts and other staff transitions have slowed progress assigning VPMs and developing volunteer management plans. However, simply conducting this exercise revealed several upcoming position vacancies that lacked clear successors. McGill staff have already been able to use the list as a "go-to" resource to fill these vacancies strategically, in a headhunting or executive-recruiting fashion.

Putting Intentions in Writing

Components of a Volunteer Management Plan

1. Name
2. Degree(s)
3. Prospect rating
4. Current volunteer position, and term expiry
5. Past volunteer service
6. Key interests
7. Volunteer effectiveness ratings as collected through Top 100 Process
8. Engagement or affinity ratings
9. Capacity or wealth screenings
10. Proposed next volunteer position and timeframe
11. Potential "ultimate" volunteer position and timeframe
12. Strategy behind this objective, including links to giving interests and volunteer networks/capacity
 - a. Immediate next steps
 - b. Key individuals to involve, on McGill faculty/staff and among the larger McGill community of alumni and friends

Volunteer management plans are stored in the advancement CRM attached to an individual's record, similar to a cultivation or stewardship plan.



Treating High Potential Volunteers Like Donors

"Much like Prospect Management Plans, Volunteer Management Plans would help provide for continued, effective management of volunteer resources and ensure that volunteer talents are used effectively and in ways consistent with the wishes and skill sets of volunteers."

Royal Govain

Managing Director, Volunteer Partnerships



Even More Proactive in the Future?

In the future, McGill University hopes to repeat this exercise alongside student affairs and alumni relations colleagues to create a "Young 100" list, that would aim to identify "must-engage" graduating seniors and graduates 10 years out. Eventually, a process would exist to bridge these two lists and transfer high-potential volunteers from one to the other.

Source: EAB research and interviews.



Want to Learn More?

This practice brief is part of the EAB Advancement Forum's research initiative, entitled: "The New Rules of Engagement: Building the Next Generation of Alumni Leaders and Volunteers."

To learn more about this research and find other resources, access the [Alumni Leadership and Volunteerism Resource Center](#). If you have any trouble accessing this page, please consult your Dedicated Advisor.



EAB

Education Advisory Board

2445 M Street NW, Washington DC 20037

P 202.266.6400 | F 202.266.5700 | eab.com