



# Real-Time Strategy Coaching

Building Skills Through Executive Sponsorship Programs

# Advancement Forum

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# Real-Time Strategy Coaching

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## Practice in Brief

In a formal mentorship program, fundraisers are paired with senior leaders on a prospect-by-prospect basis. This allows junior staff to gain exposure to top prospects and mentors, while extending the portfolio reach of fundraising leaders.

## Results

Builds skills and competencies of fundraisers while increasing the number of prospects reached and total dollars raised, specifically for principal gifts.

## Components

### *Component #1: Partner-Associate Approaches to Fundraising*

Senior-level fundraisers (executive sponsors) and junior-level fundraisers (associates) team-up to reach prospects or further prospect relationships through a collaborative approach. As such, the junior-level staff have the opportunity to learn from and be coached by senior staff, while senior-level staff have the opportunity to gain assistance with outreach and execution of prospect strategy.

### *Component #2: Clearly Defined Ground Rules*

The mentorship occurs on a prospect-by-prospect basis. Guidelines ensure that the members of the partnership work together in a synergistic manner to achieve two goals: increasing fundraising production and developing skills and competencies.

### *Component #3: Shared Credit for Dollars Raised*

Executive sponsors (e.g., Chief Development Officers, Principal Gifts Officers, and Vice Presidents) and associates (e.g., Development Officers, Major Gifts Officers, and Associate Major Gifts Officers) agree to the partnership because they both receive credit towards their revenue goals.

## Resource Considerations

Easily implemented and can be done at no cost; requires senior-level fundraisers to dedicate time to working with prospects alongside junior-level fundraisers.

### *Profiled Institution:*

University Hospitals Health System in Cleveland, OH.

# Creating Opportunities for Learning-While-Doing

Traditional training opportunities, including workshops and conference presentations, are information-heavy, but lack opportunities for participants to immediately practice new skills. To make training more effective, include opportunities for on-the-job learning and skill building.

On-the-job skill building has many benefits for frontline fundraisers and other staff. It easily fits into busy schedules, as it is integrated into a fundraiser's core responsibilities. Additionally, it provides opportunities to immediately apply new skills and receive feedback. This ensures that new knowledge is integrated into pre-existing skills.

Integrating skill-building into an employee's core responsibilities has three times more impact than traditional training on employee performance. For frontline fundraisers, real-time strategy coaching builds relationship-building skills for both junior and senior MGOs without sacrificing time or gift credit.

## 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

# Real-Time Strategy Coaching

## Component #1: Partner-Associate Approach to Fundraising

Most law firms utilize a partnership model in which a partner acts as the external face of the firm and an associate completes most back-end work. The associate eventually takes over the relationship, involving the partner at key intervals.

University Hospitals adopted this approach in fundraising to resolve a major problem: many senior level clinicians, leaders, and prospects prefer to work with high-level development staff, but senior leaders do not have enough time to fully own these relationships.

Both development officers (DOs) and senior leaders may initiate an executive sponsorship, and either the DO or the senior leader may own the prospect relationship.

Through the partnership model, the DO receives senior-level guidance and sign-off on the strategies he or she develops. The senior leader receives support expanding their reach to a larger prospect pool without time-intensive office work.

## Borrowing From a Known Partnership Model

### Law Firm Model Builds Skills Through Real-Time Coaching



#### Senior Leader (CDO or VP)

- 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

### 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*

## 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

## Component #2: Clearly Defined Ground Rules

Ground rules ensure senior leaders prioritize the program. Because all strategy and moves on a sponsored prospect must receive approval from the executive sponsor, the executive must agree to avoid creating roadblocks in the process. Regularly scheduled communication, including planned monthly meetings and ongoing phone and email correspondence, allows all participants to meet expectations. To guarantee in-person exposure for the associate, the sponsor agrees to introduce development officers to prospects early in the cultivation process.

## Component #3: Shared Credit for Dollars Raised

Joint credit reinforces a collaborative team environment. Senior leaders receive credit for the work completed with the DO, and the DO obtains credit for the work completed with the senior leader.

Leaders track prospect progress in two ways. First, they tag prospects in executive sponsorships in their IT systems. Second, executive sponsors receive credit for individual funds raised and funds raised through executive sponsorship in end-of-fiscal-year reports.

## Setting Clear Ground Rules

*Guidelines Ensure Executive Sponsors Foster Fundraising Learning*

### Governing Principles of Executive Sponsorship Program at University Hospitals

- All strategy and moves for a prospect must receive approval from the executive sponsor
- Executive sponsors cannot hold up the process
- Executive sponsor will do his/her best to introduce the development officer
- There must be constant communication between the executive sponsor and development officer through:
  - Monthly meetings
  - Regular calls and emails
- The executive sponsor does his/her best to create a collaborative and trusting environment

## Sharing Credit for Dollars Raised

*An Added Incentive to Say 'Yes' to Sponsorship*

### How DO/Senior DO Gets Credit

#### Individual Performance Metrics

|                                 |  |
|---------------------------------|--|
| Visits                          | Stewardship Complete                   |
| New Visits                      | Prospects with Raiser's Edge Proposals |
| Solicitations (includes mail)   | Meetings with Natural Partners         |
| Major Gifts Closed              | Email Addresses                        |
| Closed Gift Dollars             | Assists                                |
| Prospect Count                  | Prospect Donor in 2013                 |
| Prospect Referrals              | Dollars Raised within Five Years       |
| Updated Raiser's Edge Proposals | Gift Dollars Linked to Proposals       |
| Top Prospects                   |  |

### How CDO/VP Gets Credit



**\$ Sponsored**

Added to Executive Sponsor's end-of-year performance totals

Source: The Philanthropy Leadership Council, "Philanthropy Talent Management: Tactics for Transforming a High-Turnover Culture," *The Advisory Board Company*, 2014; EAB interviews and analysis.

## Providing Invaluable Training for DOs

Development officers who participate in the program receive invaluable benefits: exposure to senior leadership, one-on-one training, professional growth, and the increased ability to raise funds.

DOs learn to build skills with donors and key allies, while receiving real-time feedback and coaching.

University Hospitals began the program on a trial basis for one year. After this initial year, program participants were more successful than development officers who had not participated. The program has since been expanded to the entire development team.

## Extending the Reach of Senior Leaders

Senior leaders gladly participate in the program, because it creates the opportunity to reach prospects they would otherwise not have time to reach. Through the partnership, senior leaders extend their prospect reach and advance their leadership and management skills.

Furthermore, University Hospitals discovered that the program increased the institution's overall ability to secure principal gifts. After the first year of the program, the development team exceeded their goal for gifts of at least \$5 million.

## Benefits for All Participants

### Improved Performance and Greater Prospect Reach

#### Key Benefits for DOs

- ✓ Feedback from senior leaders on strategy creation and execution
- ✓ Exposure to multiple senior leaders
- ✓ Ability to work with higher-level major giving prospects
- ✓ One-on-one training
- ✓ Increase in total dollars raised
- ✓ Ability to move up ladder faster

#### Accelerated Performance

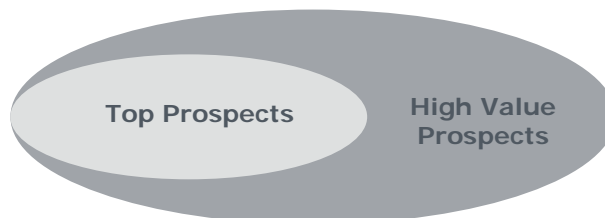
“Development officers accelerate their learning and performance curve. And every fundraiser is working on at least one \$5M+ gift.”

*Sherri Bishop, Chief Development Officer University Hospitals*

## Prospects Reached Under Shared Model

Reached in a year *without*  
DO assistance

Reached in a year  
*with* DO assistance



#### Exceeding Goal Expectations

**\$40M**

Cumulative annual goal in 2015 for \$5M Gifts

**\$56M**

Resulting gift total of \$5M+ gift requests in 2015

Source: The Philanthropy Leadership Council, "Philanthropy Talent Management: Tactics for Transforming a High-Turnover Culture," *The Advisory Board Company*, 2014; EAB interviews and analysis.

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The best  
practices are  
the ones that  
work for **you.**<sup>SM</sup>

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