



# Talent Review Leader Training Logistics Guide

# Advancement Forum

## Project Director

Katie Stratton Turcotte, M.S.

## Contributing Consultants

Jennie Light

Dena Schwartz, M.S.

## Managing Director

Liz Rothenberg, Ph.D.

### LEGAL CAVEAT

The Advisory Board Company has made efforts to verify the accuracy of the information it provides to members. This report relies on data obtained from many sources, however, and The Advisory Board Company cannot guarantee the accuracy of the information provided or any analysis based thereon. In addition, The Advisory Board Company is not in the business of giving legal, medical, accounting, or other professional advice, and its reports should not be construed as professional advice. In particular, members should not rely on any legal commentary in this report as a basis for action, or assume that any tactics described herein would be permitted by applicable law or appropriate for a given member's situation. Members are advised to consult with appropriate professionals concerning legal, medical, tax, or accounting issues, before implementing any of these tactics. Neither The Advisory Board Company nor its officers, directors, trustees, employees and agents shall be liable for any claims, liabilities, or expenses relating to (a) any errors or omissions in this report, whether caused by The Advisory Board Company or any of its employees or agents, or sources or other third parties, (b) any recommendation or graded ranking by The Advisory Board Company, or (c) failure of member and its employees and agents to abide by the terms set forth herein.

The Advisory Board is a registered trademark of The Advisory Board Company in the United States and other countries. Members are not permitted to use this trademark, or any other Advisory Board trademark, product name, service name, trade name and logo, without the prior written consent of The Advisory Board Company. All other trademarks, product names, service names, trade names, and logos used within these pages are the property of their respective holders. Use of other company trademarks, product names, service names, trade names and logos or images of the same does not necessarily constitute (a) an endorsement by such company of The Advisory Board Company and its products and services, or (b) an endorsement of the company or its products or services by The Advisory Board Company. The Advisory Board Company is not affiliated with any such company.

### IMPORTANT: Please read the following.

The Advisory Board Company has prepared this report for the exclusive use of its members. Each member acknowledges and agrees that this report and the information contained herein (collectively, the "Report") are confidential and proprietary to The Advisory Board Company. By accepting delivery of this Report, each member agrees to abide by the terms as stated herein, including the following:

1. The Advisory Board Company owns all right, title and interest in and to this Report. Except as stated herein, no right, license, permission or interest of any kind in this Report is intended to be given, transferred to or acquired by a member. Each member is authorized to use this Report only to the extent expressly authorized herein.
2. Each member shall not sell, license or republish this Report. Each member shall not disseminate or permit the use of, and shall take reasonable precautions to prevent such dissemination or use of, this Report by (a) any of its employees and agents (except as stated below), or (b) any third party.
3. Each member may make this Report available solely to those of its employees and agents who (a) are registered for the workshop or membership program of which this Report is a part, (b) require access to this Report in order to learn from the information described herein, and (c) agree not to disclose this Report to other employees or agents or any third party. Each member shall use, and shall ensure that its employees and agents use, this Report for its internal use only. Each member may make a limited number of copies, solely as adequate for use by its employees and agents in accordance with the terms herein.
4. Each member shall not remove from this Report any confidential markings, copyright notices and other similar indicia herein.
5. Each member is responsible for any breach of its obligations as stated herein by any of its employees or agents.
6. If a member is unwilling to abide by any of the foregoing obligations, then such member shall promptly return this Report and all copies thereof to The Advisory Board Company.

# Supporting Members in Best Practice Implementation

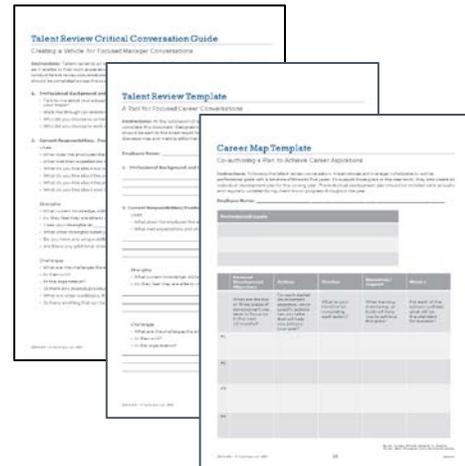
## Resources Available Within Your Membership

This toolkit is part of a suite of resources, detailed below, dedicated to assisting members in conducting a simulation-based coaching exercise with advancement staff. This toolkit is a new addition to our strategic talent management resource library.



### Presentation PowerPoint Deck

Instructional slides for participants, which contain information about communicating, sharing feedback, and conducting effective talent review conversations with direct reports.



### Downloadable Handouts

Ready-made handouts and tools to employ in the experiential exercises across this session and during formal talent review conversations.

Download Talent Review Leadership Slides and Handouts at [eab.com](http://eab.com)

---

## Talent Management Resources

Over the past several years, the Advancement Forum has developed multiple resources to assist members with advancement talent management. The most relevant resources are outlined here. All of these resources are available in unlimited quantities through your membership.



### Competing for Talent

#### *9 Strategies for Improving Major Gift Officer Recruitment*

Best practices and accompanying tools for building long-term candidate pipelines, designing interview and hiring processes, and providing an onboarding program that accelerates productivity to put your institution ahead in an MGO search.



### Gifted and Talented

#### *What Makes a Top Fundraiser in the Age of Venture Philanthropy?*

How to develop a new human capital strategy, and prescriptions for a new approach to fundraiser selection to enhance your MGO interview process.



### Making Meaning of Metrics

#### *Leveraging Accountability and Analytics to Enhance Fundraiser Productivity*

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.



### Perfecting the First 180 Days

#### *Onboarding Toolkit for Major Gift Officers*

A 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](http://eab.com).



### The Professional Development Playbook

#### *Targeting Skill-Building and Maximizing Advancement Staff Performance*

Tools for instilling accountability, diagnosing skill gaps, and deploying high-impact skill-building to realize untapped potential among fundraisers and set institutions apart in the talent war



### 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](http://eab.com).

# Supporting Managers in Talent Review Conversations

---

## Tools to Plan Proactive Professional Development

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

Managers can make-or-break a talent acquisition and retention strategy. In today’s landscape of increasing competition for top fundraising talent, it is essential to prepare managers to play a proactive role in professional development strategy. However, this often results in additional performance reviews, which evaluate previous goals and achievements, but which often ignore career aspirations and an understanding of what direct reports’ goals for the future may be.

### **Not Just Another Performance Review**

A talent review conversation is forward-focused and forms the basis of a career development plan. However, managers do not necessarily have the competencies to conduct these conversations with their direct reports. In order to enable managers to help their direct reports succeed, talent review training needs to take place. Managers need to understand their overall role in the success of every member of their team.

In particular, talent review conversations enable managers to have a guided discussion with direct reports that covers:

- Professional aspirations
- Skill gaps, or areas needing improvement for long-term success in the role
- Professional development options in order to fill skill gaps and succeed in the role

### **Talent Review Leader Training Logistics Guide**

This guide provides everything you need to implement talent review conversations at your institution. It will enable you to educate managers on their importance to the success of their teams. It will also help you train them to hold talent review conversations with their direct reports. While these resources focus on individuals who manage fundraisers, the tools can (and should) be used to strengthen talent review processes for all advancement managers

# Talent Review Leader Training Logistics Guide

**Target audience for workshop:** Managers of frontline fundraisers and other advancement managers

**Type of exercise:** Competency and skill development through experiential learning exercises

**Time commitment:** One-and-a-half to three hours

**Participants:** Session facilitator, managers within the advancement team

## Preparing to Hold the Training

	Implementation Materials
	<a href="#">Talent Review Leader Training PowerPoint Deck</a>
	<a href="#">Talent Review Critical Conversation Guide</a>
	<a href="#">Talent Review Template</a>
	<a href="#">Career Map Template</a>



### Ensuring a Successful Session

Given the experiential nature of this session, it is critical to ensure this session is conducted with a group of peers. The session should not be conducted with a group of managers and their direct reports.

While this session is designed to support and train managers who will be conducting talent review conversations, an abridged version can be employed to introduce the talent review process to the full advancement team.

# Facilitator Preparation Guide

## Facilitator Instructions:

Use the following steps when preparing to lead a talent review training and experiential exercise session. Check the box in the column on the right to indicate completion of a step.

Step	Complete
1. Familiarize yourself with Talent Review Leader Training Materials. <ul style="list-style-type: none"> <li>a. Talent Review Leader Training Logistics Guide</li> <li>b. Talent Review Leader Training PowerPoint – speaking points can be found in the notes section of each slide</li> </ul>	<input type="checkbox"/>  <input type="checkbox"/>
2. Update the PowerPoint deck to reflect any institution-specific information as it relates to strategy and/or the timeline for talent review implementation.	<input type="checkbox"/>
3. Choose fundraising staff to participate in the activity. <ul style="list-style-type: none"> <li>a. Ensure that there are no direct reports of participants in the session.</li> <li>b. Determine if multiple sessions need to be held to train all managers who will be conducting talent review conversations.</li> </ul>	<input type="checkbox"/>  <input type="checkbox"/>
4. Schedule the training one to two months ahead of time. <ul style="list-style-type: none"> <li>a. Choose a realistic location (e.g., small classroom or other flexible meeting space), and ensure that it is set-up to easily group participants into groups of two.</li> <li>b. Contact university administrators to reserve simulation space for 1.5 to 3 hours (depending on the time you wish to provide for the experiential aspects of this training).</li> </ul>	<input type="checkbox"/>  <input type="checkbox"/>
5. Contact participants. <ul style="list-style-type: none"> <li>a. One to two months before the training, send all participants an introductory email with an Outlook Calendar invitation for the scheduled session (see Introductory Email Template on page 7).</li> <li>b. Two weeks before the scheduled training, send a reminder email to participants.</li> </ul>	<input type="checkbox"/>  <input type="checkbox"/>
6. Gather required supplies for the workshop: <ul style="list-style-type: none"> <li>a. PowerPoint presentation (downloaded on the laptop to be used on the day of the session)</li> <li>b. Computer, projector, and cord to connect computer to projector</li> <li>c. Printed session Handouts (see page 5 for list)</li> <li>d. Pens or pencils</li> <li>e. Flip chart, white board, or chalk board, and marker or chalk</li> </ul>	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>

# Introductory Email Template

---

**Instructions:** Up to 90 days before the session, use this template to send an email to managers chosen to participate in talent review training. This email can be sent once a date has been set for the session, or the message can be followed by a calendar invitation once rooms have been reserved. Information in brackets should be customized to fit your institution.

**Attachment:** Talent Review Training Description and Agenda (page 8) should be included in this email.

Dear Colleagues,

You have been selected to participate in Talent Review Manager Training. This mandatory session is a two-and-a-half to three hour training session, which will be focused on helping participants practice critical management competencies that will help build stronger relationships with your team. At the same time, it will help you create a plan to enact professional development for your team based upon the needs of the institution, team members' individual career aspirations, and key skill gaps.

The workshop will allow you to learn the rationale behind instituting talent review conversations. It will also provide opportunities to practice the components of the conversations you will be required to have with your team members. While this training is designed to help support the implementation of talent review conversations, it will also provide opportunities for self-discovery and professional development with a group of your peers within advancement.

Sincerely,

[*Your Name*]

# Talent Review Training Description and Agenda

**Instructions:** Attach the following description in the initial email outreach to explain the workshop to participants and to communicate the timeline for the workshop.

## Talent Review Training Session Description

The Talent Review Leader Training is designed to help managers learn about the communication skills involved in conducting talent review conversations, and then practice using them. The session was developed by the Advancement Forum and informed by the experience of the advancement professionals at the University of Florida. Through this session and its related exercises, managers will hone the skills and competencies required for strengthening their relationships with direct reports. It will help managers effectively identify career aspirations and plan for the application of professional development programming to build skills and serve as a retention lever.

Across the workshop, we will discuss and develop best practices, provide feedback to each other, and reflect on the experience. At the end of the session, every manager will not only have a personal career map and IDP for himself or herself, but will also be prepared to conduct talent review conversations with their direct reports.

Agenda	
15 minutes	<ul style="list-style-type: none"><li>• Welcome the group.</li><li>• Set the framework for the day and walk through the introduction to the session: Why Managers Matter.</li></ul>
40 minutes	Introduce the communications section (section 2) and conduct the exercises outlined in this section.
5 minutes	Introduce talent review conversations and the tools you will employ for the remainder of the session.
10 minute break	
45-60 minutes	<ul style="list-style-type: none"><li>• Allow participants to walk through each of the three exercises to practice having talent review conversations with each other.</li><li>• Instruct the participants to conduct the experiential exercises as themselves; it will provide the added bonus of planning their own professional development prior to their participation as the recipient of a talent review conversation with their manager.</li></ul>
Homework	Participants should schedule talent review conversations with their direct reports.

Source: Melvin A, "How a Video Camera Can Improve Fundraising Training," *Chronicle of Philanthropy*, April 16, 2015, <https://philanthropy.com/article/Advice-How-a-Video-Camera-Can/229367>; EAB interviews and analysis.



EAB

Education Advisory Board

2445 M Street NW, Washington DC 20037

P 202.266.6400 | F 202.266.5700 | [eab.com](http://eab.com)