



RESEARCH BRIEF

Training Programs for Advancement Staff

Advancement Forum

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Table of Contents

1) Executive Overview	4
Terminology.....	4
Key Observations	4
2) Structure of Training Programs.....	5
Types of Trainings	5
3) Training Implementation and Delivery	7
Training Team.....	7
Delivery Format	8
Generating Attendance.....	10
4) Assessment of Programs	11
Evaluation and Improvement of Trainings.....	11
5) Research Methodology.....	13
Project Challenge	13
Project Sources	14
Research Parameters	14

1) Executive Overview

Terminology

Development officers: Institutions use different naming systems to describe the unit responsible for training advancement staff. This brief defines this unit as the advancement training team or organizational development team and refers to individual team members as administrators, development officers, or trainers.

Key Observations

Advancement staff attend trainings on institutional policies and procedures, professional development, campus history and culture, software and technology, and health and wellness. Onboarding sessions introduce staff to core job functions and their university's culture and structure. Trainers within the advancement department provide ongoing business and technology skills trainings throughout the year, offering at least one program per month. Sessions are open to all advancement staff members and vary in size from three to 100 attendees. Advancement offices include internal development units which create programs tailored to the needs of their staff.

Advancement training teams provide courses specific to employee role, leadership positions, and university campaigns. For example, major gift officers attend a course on the university's database, while supervisors attend a session on management and leadership. During the launch of a campaign, training teams design new programs to inform advancement staff about the campaign and generate excitement.

Development officers design training curriculum internally, but partner with other university departments and outside vendors on course delivery. Administrators invite guest speakers from human resources and other departments to present on their fields. Popular trainings include group informational interviews with deans and department heads and sessions with faculty and student speakers. Development teams occasionally invite external parties to lead trainings, such as a public speaking course from Own the Room! and sessions from Academic Impressions.

Most training sessions occur in person, although officers hope to develop more virtual content. Lectures are the most common training presentation format. However, advancement staff prefer live, interactive sessions such as group discussions, roundtables, workshops, case study exercises, and drill sessions. Development officers provide webinars and other virtual training options, as well as electronic access to training materials and recordings of sessions.

Administrators designate orientations and fundamental trainings as mandatory and invite staff to attend both required and optional sessions. Senior leaders send invitations to required sessions. New employees receive a calendar outlining all mandatory sessions and an email with direct links to complete online trainings. Managers encourage staff to attend optional trainings and discuss new learning opportunities during talent review processes.

Development officers use surveys and informal conversations to monitor the effectiveness of their training programs. Officers do not presently use data-gathering or formal metrics to evaluate their programs, although they express interest in doing so. Trainers receive high response rates from both paper and electronic surveys, which they use to modify programs and identify popular presenters. Training teams focus on consistently delivering high quality programming, as valuable programs generate high staff attendance.

2) Structure of Training Programs

Types of Trainings

Offer Trainings on Policies, Role Function, and Business Skills at Orientations and Regularly Occurring Sessions

Advancement staff participate in mandatory onboarding during their initial months of employment and may also attend additional trainings of their choosing. All institutions offer at least one session per month.

Advancement Staff Training Curricula

Orientation and Onboarding



Advancement staff receive training at orientations on department expectations, university policies and procedures, benefits, and the endowment and funding structures of their respective institutions. Mandatory sessions typically occur within four to 12 months of the employee's initial start date. Trainers at the **Institution D** also provide a week of "pre-boarding" that includes one-on-one sessions for new staff members on campus databases and policies.

Ongoing Professional Development



Development offices provide skills trainings throughout the year. Key programs, often labeled "101 sessions," provide insight into the endowment, fundraising, and investment strategies. These sessions generally occur on a quarterly or biannual basis and are open to all advancement staff members. Training teams offer ongoing skills trainings sessions on time management, emotional intelligence, difficult conversations, writing, proofreading and grammar, and research.

Technology Trainings



Advancement staff attend technology and software trainings on the university databases and intranet, Blackbaud, File Maker, Microsoft Office, and other software used by advancement offices. Technology trainings range from basic courses to sessions for more advanced users. **Institution E** offers over 100 technology courses with approximately 15 classes focused on the university's internal database.

Leadership Development



Staff in supervisory positions receive additional trainings on leadership and management; these trainings are most often targeted to department heads. **Institution C** currently offers a leadership development program in modules that occur over six to eight months. Advancement staff at **Institution E** may participate in a six month mentorship program.

Performance Evaluations and Talent Review



Advancement staff create work plans and assess their job performance in annual talent review processes. While no institution evaluates employees based on their attendance of trainings, development officers expect staff to mention valuable trainings during the talent review process and identify new trainings to attend in the upcoming year.

Health and Wellness Programs



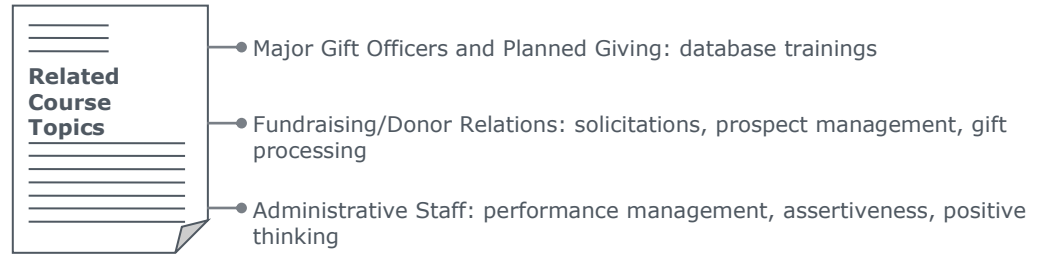
Development offices host monthly health and wellness sessions, such as yoga or meditation classes. Advancement staff at **Institution E** also participate in annual retreats.

Expect Varying Attendance at Training Programs

Attendance may be as small as three staff members at database trainings or as large as 100 at a mandatory training for new employees at **Institution D** entitled "The Academy." An average of 12 advancement staff members attend each training session at **Institution A**.

Tailor Training Sessions to Specific Role Functions

Training teams organize courses into job tracks and send staff members the appropriate list of trainings for their respective roles.



Generate Excitement for Campaigns with Special Training Sessions

Trainers at all profiled institutions offer additional programs during the launch year of a campaign. Advancement staff learn about the purpose of a campaign, what to expect during the campaign's public launch, and how the campaign will change their daily work. Through trainings, officers hope to motivate an enthusiastic, stable team for the entirety of the campaign. **Institution A**, while currently not in a campaign, plans to partner with Academic Impressions for future campaign trainings due to positive staff responses to other courses led by Academic Impressions. **Institution B** keeps a "campaign toolkit" available on the university intranet for advancement staff to reference.

3) Training Implementation and Delivery

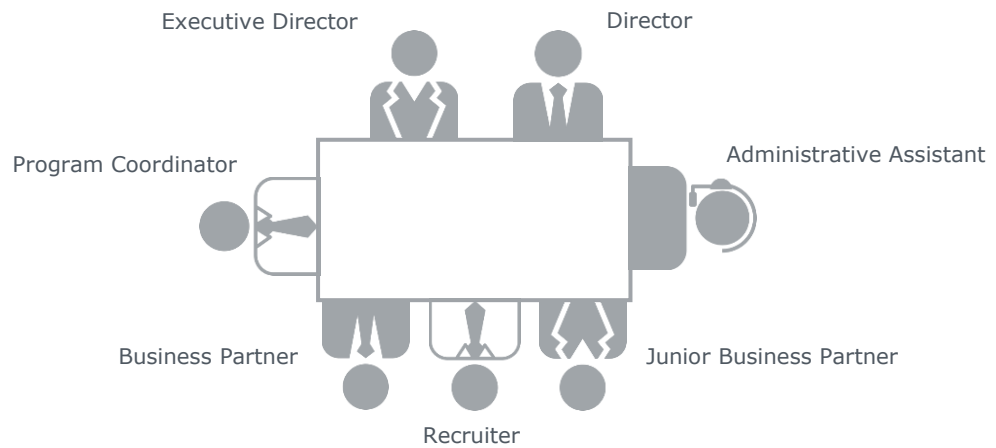
Training Team

At **Institution E**, one IT staff member works halftime on the IT help desk and halftime on advancement training programs.

Create an Organizational Development Team for the Advancement Office to Determine Unit-Specific Trainings

All profiled institutions possess a decentralized administrative structure. The university’s central human resources department houses an organizational development team which offers trainings on broad topics relevant to all university staff. Advancement offices also possess an internal organizational development team that functions independently. This team creates and conducts trainings specific to the skills and software needs of advancement staff. At **Institution B**, the Resource (Organizational) Development and Alumni Affairs offices are co-located, allowing senior leaders to hold combined trainings for greater staff interaction.

Sample Organizational Development Team at Institution B



Form an Advisory Committee to Monitor Advancement Training Programs

Institution A created a Professional Development Advisory Committee to study and recommend professional development programs for their advancement office, as well as non-advancement staff members who also fundraise. Committee members serve a one to two year term at the recommendation of their managers and meet quarterly. Current members represent Advancement Information Services, Human Resources, Alumni Relations and Annual Giving, Corporate and Institutional Partners, Foundation Relations, Development, Donor Relations, and three academic colleges.

The Professional Development Advisory Committee was instrumental in launching Institution A’s first Professional Development Day. The in-day received overwhelmingly positive feedback and had a participation rate of over 90 percent of staff in relevant roles. As a result, trainers at Institution A plan to permanently add the program to the annual training curriculum.

Develop Curriculum Internally to Reflect Unique University Structures and Cultures

Senior leaders at all profiled institutions design their curricula internally. Development officers consult other institutions, attend conferences, and reference EAB and other materials to create their programs. For example, the Association of Donor Relations Professional (ADRP) provides materials on training programs specific to donor relations staff that trainers cited when developing those sessions. However, presenters may be external vendors or university staff from outside the advancement office, depending on the content.

Training Presenters

Development Team	At most institutions, the advancement office’s organizational development team leads all or most training programs for advancement staff.
Central Human Resources	Rather than duplicate trainings, administrators send advancement staff to preexisting courses offered by the university’s central human resources department. Training topics include management, supervision, emotional intelligence, and other business skills.
University Officers, Faculty, and Students	Deans, department heads, faculty, and students speak at sessions for advancement staff on campus culture and history. Officers from other administrative departments deliver trainings on their areas of expertise. For example, a staff member from the Institute Community & Equity Office at Institution B presents the training session on diversity and inclusion to advancement staff.
External Partners	Development officers occasionally invite outside vendors to present trainings. Own the Room! led a well-received public speaking course at Institution D . Institution E hosted FranklinCovey for a time management workshop.

Delivery Format

Provide In Person and Online Trainings that Include Discussions, Panels, and Role Play

All profiled institutions offer both of face-to-face and online trainings, although most trainings occur in person. Development officers want to create more virtual options, but know that staff value the interaction and networking opportunities of live sessions.

Training presenters determine the format of their sessions. Lectures are most common, but advancement staff prefer more interactive styles such as workshops, role play exercises, case studies, and drill sessions. For example, **Institution A** offers a popular “management roundtable.” Participants receive a pre-read document before the session and then discuss the content during the training.

Online content includes webinars, EAB materials, and remote access to retreats. **Institution E** subscribes to Lynda.com for additional technology and business skills courses. Contacts also warn that technology trainings (e.g., university intranet, advancement databases, Microsoft Office) are best conducted in-person, as the employees who most require these trainings are the least likely to successfully complete them online.

Make Training Materials Accessible In Person and Online

Administrators save print and electronic copies of training materials for advancement staff to reference prior to or after trainings.

Strategies to Improve Accessibility



Provide Hard Copies of Training Materials

Administrators at **Institution E** give advancement staff a binder of training documents on their first day. Because development officers modify these documents throughout the year, they reprint the materials at the end of each year. Staff can access the updated physical copies of the binders in the development office.



Save Slide Decks to University Intranet

Save PowerPoint presentations and other materials to the university intranet, internal advancement website, or a shared drive.



Record Trainings and Make Webinars Permanently Accessible

When budgets allows, development officers coordinate with media/technology departments to record and upload session to the university intranet.

Hold At Least One Training Per Month

Administrators at all institutions offer at least one training session per month, and often host multiple sessions monthly. Role-specific trainings occur at new hire orientations and other set dates throughout the year. Most contacts schedule these fundamental trainings on a quarterly basis.

During campaigns, development officers add additional courses to the training calendar, especially during the semester of the campaign's public launch.

From July to December 2015, **Institution A's** advancement development team offered 39 sessions with a total of 466 participants.

Sample Training Calendar

Topic or Target Audience	1 or 2 Sessions Per Year	Quarterly	Monthly	Occasionally
Major Gift Officer Training		X		
Planned Giving Staff Training		X		
Supervisor Training	X			
Technology Trainings			X	
Advancement In-Day	X			
Health and Wellness			X	
Webinars				X

Generating Attendance

Provide Advancement Staff with a Calendar of Courses and Send Invitations

Aside from orientation courses and required trainings (e.g., university-mandated diversity training), most sessions are optional. Trainings are always open to any staff member who wishes to attend.

At **Institution D**, new advancement staff members receive a personalized calendar of required trainings to attend in their first five months of employment. Sample topics include "Endowments 101" and "Go Institution D's mascot!" on Institution D history and campus lore. After completing these mandatory sessions, advancement staff choose to attend optional trainings. Staff at **Institution C** can view the training calendar online and register for sessions on the university intranet.

Strategies to Generate Staff Attendance

Mandatory Sessions

- ✓ Provide new employees with a training calendar outlining required sessions.
- ✓ Have senior leaders email the invitations with language "cordially inviting" and "strongly encouraging" staff to attend.
- ✓ Send invitations to complete online trainings directly to staff. Track the completions electronically.
- ✗ Avoid labeling sessions as "mandatory" or "required." Officers believe staff are less inclined to attend sessions that are overtly compulsory.

Optional Sessions

- ✓ Encourage managers to recommend trainings to the staff members they supervise.
- ✓ During performance evaluations, advancement staff should identify at least one new topic in which to complete training during the next year.
- ✓ If necessary, call staff members directly to invite them to sessions.

Encourage Attendance with Quality Content

While ongoing professional development sessions are optional, development officers believe that advancement staff willingly attend sessions seen as valuable, as staff members are genuinely interested in professional development opportunities. High quality programming generates good attendance. Certain speakers, such as dean, other senior leaders, and external presentations draw large audiences. Advancement staff also enjoy campus-focused programs where they can engage with students and faculty.

4) Assessment of Programs

Evaluation and Improvement of Trainings

Send Out Surveys Immediately After Trainings

Development officers rely on paper and electronic surveys to gather feedback on their programs. Administrators at **Institution E** have seen particularly high success (50 to 70 percent response rates) with SurveyMonkey forms.

Survey Format and Timing



Paper Surveys

Provide paper forms at the end of programs for staff to write comments before they leave the room.



Electronic Forms

Send out online surveys through SurveyMonkey immediately after each session.

Development officers also meet informally with managers and senior leaders to discuss the training offerings. Through these conversations, they ensure managers access and use available materials to coach their staff, and that programs are aligned with the needs of their departments. Advancement employees also offer feedback during all-staff meetings. Administrators expect that managers and staff members discuss training attendance during the performance review process, although attendance is not a factor in rating employee performance. Departing staff members may also comment on their training experience during exit interviews.

Survey responses reveal that the most popular trainings are interactive sessions, group informational interviews with senior leaders, and courses about the university and overall state of higher education.



Data-Gathering and Metrics

Presently, no development office uses data-gathering and formal metrics to evaluate their programs. While contacts express interest in using data, no administrator currently has the resources to do so or views data-gathering as a priority. Without this data, administrators also question how to determine the return on investment (ROI) when assessing programs.

Modify Programs Based on Survey Responses

Officers occasionally receive ideas for new programs through survey responses and informal conversations with staff. These comments guide development officers in modifying the content and delivery formats of trainings. For example, development officers at **Institution E** split one technology course into two offerings—one introductory course for beginners and one for advanced users—based on the result of a SurveyMonkey poll.

Development officers focus on updating onboarding courses and creating new programs in partnership with other university offices and senior leadership. Administrators are particularly interested in working more closely with the deans on their campuses to ensure trainings are aligned with the goals and fundraising needs of individual colleges.

Two institutions (**Institution C** and **Institution D**) plan to develop student internship programs and apprenticeships for recent graduates and lower-level staff. Administrators will create new training courses for the interns, apprentices, staff members involved in the programs.

5) Research Methodology

Project Challenge

Leadership at a member institution approached the Forum with the following questions:

- What types of training do advancement staff receive at contact institutions?
- How large are staff groups for different types of training sessions?
- To which parties are advancement training sessions open?
- If institutions have a formal training plan or curriculum for advancement staff, were these programs developed in-house or did contacts outsource program development?
- Which vendor/tools did advancement administrators use for outsourced training program development?
- How would contacts rate their satisfaction with this vendor/tool? What were the reasons for their satisfaction or dissatisfaction?
- Which parties are responsible for delivering training to advancement staff at contact institutions?
- At institutions with employee trainers, to which departments do trainers report?
- In what format(s) do advancement units deliver staff training?
- What types of strategies do trainers employ to maintain employee engagement during trainings?
- What tools do advancement units use to deliver staff training?
- How often do advancement units offer staff training sessions?
- Are staff training sessions mandatory or optional? How do contacts motivate staff to attend optional trainings?
- What role, if any, does training and development play in staff performance evaluations?
- How do contacts ensure that employees can access training materials after the session?
- How frequently do contacts review or update stored or recorded training materials?
- What impact, if any, do campaigns have on advancement staff training?
- How do advancement administrators evaluate staff training needs?
- What metrics do contacts employ to measure the success of staff training?
- How do performance metrics differ during a campaign or new system implementation?
- How soon after a campaign or new system implementation do advancement administrators return to previous performance metrics?
- How do contacts measure success of staff training?
- What connections, if any, have contacts observed between training and employee engagement or retention in advancement units?
- What challenges do contacts encounter in training advancement staff? What improvements would contacts make to current training programs?

Project Sources

The Forum consulted the following sources for this report:

- EAB’s internal and online research libraries (eab.com)
- The Chronicle of Higher Education (<http://chronicle.com>)
- National Center for Education Statistics (NCES) (<http://nces.ed.gov/>)
- Institutional websites

Research Parameters

The Forum interviewed administrators in the advancement, development, or human resources offices at the following institutions:

A Guide to Institutions Profiled in this Brief

Institution	Location	Approximate Institutional Enrollment (Undergraduate/Total)	Classification
Institution A	Mid-Atlantic	5,900 / 12,600	Research Universities (very high research activity)
Institution B	Northeast	4,500 / 11,300	Research Universities (very high research activity)
Institution C	Midwest	8,400 / 12,1200	Research Universities (very high research activity)
Institution D	Pacific West	29,600 / 41,800	Research Universities (very high research activity)
Institution E	Midwest	7,400 / 14,300	Research Universities (very high research activity)