

In-House Professional Development for Advancement | 11.20.15

Kathy Drucquer Duff

Please find a list below of additional resources from the “*In-House Professional Development for Advancement*” webcast. If you wish to print only certain resources, you may click their respective links to jump directly to them in the packet.

Pre-Webcast Resources

1. [Sample Favorites Form](#) – Page 2
2. [Sample Growth Progression Chart: Fundraising Track](#) – Page 3
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RESOURCE: SAMPLE FAVORITES FORM

Name:

Date:

Favorite candy/snack:

Favorite beverage:

Favorite pastime or hobby (can list more than one):

Favorite music, restaurant, and store:

If I had a free hour or day, I would:

If something good happens at the office, I want to share with my colleagues (rate in preference order:

- ☐ Individually
- ☐ Collectively
- ☐ I want my supervisor to share with my colleagues
- ☐ Other

Preferred mode of communication:

- ☐ E-Mail
- ☐ Text
- ☐ Office Phone
- ☐ Cell Phone
- ☐ 1:1 communications

Preferred after-hours mode of communication:

- ☐ E-mail
- ☐ Text
- ☐ Cell Phone
- ☐ Home Phone

Frequency of meetings/check in/follow-up:

I prefer to read materials via:

☐ Nook ☐ iPad ☐ Kindle ☐ Hardcover ☐ Other

The next best thing to money that you could give as a reward/recognition for a job well done is:

If not that, then:

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RESOURE: Sample Growth Progression Chart | Fundraising Track

Current Position: Admin III/Specialist

Desired Position: Assistant/Associate DoD

Key job descriptors

- Cultivate and solicit gifts with an emphasis on those at the \$1,000 to \$25,000 level
- Ensure regular contact with donors through various activities and communications, especially face to face visits

Job requirements:

- 3-5 years working in a complex development environment
- Strong written and oral communication skills
- Demonstrated ability to develop and implement persuasive cultivation ideas and techniques
- Commitment to philanthropic mission

Shadow Opportunities/Tandem Projects:

- Face to face visits
- Strategy sessions
- Informational interviews
- Volunteer at salon events

Training Opportunities:

- Qualification class
- What's Happening series
- Diversity in Fundraising
- Endowed Chair Workshop
- Corporate & Foundation Relations
- Learn about the FUND side of Fundraiser
- Gift Map
- Making the Cold Call
- How to Turn Around a Conversation
- Cultivation Techniques
- Making the Ask
- Privacy & Ethics in FR

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RESOURE: Sample Growth Progression Chart | Research/Prospect Management Track

Current Position: Admin III/Specialist
Desired Position: Research Analyst

Key job descriptors

- Monitor new gifts under \$1,000 for specific areas/interests
- Strong internet skills
- Able to synthesize information for donor intelligence and create alerts for the development team
- Able to assist team with updating contact reports and interfacing with other departments
- Able to develop quick prospect bios for events and meetings

Job requirements:

- Intermediate level Microsoft Office skills, especially Excel
- Demonstrated attention to detail
- Database experience preferred

Shadow Opportunities/Tandem Projects:

- Project based profile requests, like the Chancellor Roll Out
- Data mining projects - specific to unit
- Data Clean Up - for ESP or any other related database
- Reporting - prospect management shadowing

Training Opportunities:

- California Advancement Researchers Association (CARA) seminars
- Research Basics
- Advanced Research - Building a Constituent Profile
- Identify a Good Prospect
- Leveraging Data & Analytics

Date: August XX, 2014
To: xx, Assistant Director of Development, Social Sciences
From: xx, Director of Operations and Special Projects
Cc: Kathy Drucquer Duff, Associate Vice Chancellor, xxx, Senior Director of Development
Subject: Invitation to Major Gift Strategy Sessions

Welcome to the Major Gift Strategy Program! I am pleased to officially invite you to participate in this new in-house professional development opportunity. As a member of the program's first cohort, you are being offered a unique occasion to access additional coaching and mentoring resources on our team. This opportunity is designed to not only invest in your skills but also to help our overall team become even more high-performing and successful. Further, being a part of this initial cohort is a great opportunity to learn from your colleagues, share experiences and build stronger relationships with your internal team members.

Attached to this memo is a one-page overview of the program that also outlines the expectations of its participants. Please take a moment to review the information and let me know if you are interested and committed to participating. Kathy has asked me to lead the first series of these sessions, which I plan to make rewarding, challenging and of course, fun. Arlene will reach out to you soon to begin scheduling.

Only a few members of the University Development team will be invited to participate in this first cohort due to timing and the desire to keep this group small. You were chosen because Kathy and Doug appreciate your commitment to donor centered strategies and want to provide an opportunity to grow your skills in area.

Please let me know if you have any questions at this point. I look forward to working with you over the coming weeks and months!

University Development: Major Gift Strategy Sessions Program Overview and Expectations August 2014

OVERVIEW

University Development's culture is one committed to continual professional development and growth. This commitment has contributed to the formation of several internal and external educational opportunities such as the Unit Strategy Meetings, Educational Topics Meetings, Team Retreats, and investments in professional conferences, workshops, webinars and training opportunities. In addition, University Development leadership would like to create more personalized professional development opportunities, tailored specifically to individuals' strengths and growth area opportunities that support our goal of being a high-performing major gift fundraising team.

The Major Gift Strategy Sessions are offered to a small cohort of development officers at the assistant director level and above selected by the Associate Vice Chancellor of University Development. Each member of the cohort is invited to this opportunity to refine and expand their major gift strategy skills sets and work to move major gift prospects towards successful solicitations. The sessions are lead by a member of the University Development Leadership Team and the cohort will be invited to participate for a 4 month time-period.

EXPECTATIONS

Each member of the cohort is expected to make the following commitments to be able to participate in these special strategy sessions.

1. Dedicate time to participate in individual and group strategy sessions. The individual sessions will be 30-60 minutes on a weekly, bi-weekly or monthly schedule determined by either the AVC or direct hiring manager. The group sessions will be led by the AVC every 6-8 weeks.
2. Be prepared to have productive dialogue in each strategy sessions.
 - a. 2-3 new written major gift strategies to discuss in each session. The written strategies will be submitted to the session lead 24 hours in advance of the meeting. (strategy sheet templates will be provided)
 - b. 2 updates to share from previously discussed strategies
3. Being open to role-playing and coaching, especially as the strategy nears the solicitation stage.
4. Being disciplined and focused on strategy implementation and tracking.
5. Being donor-centered, personalized and creative in developing strategies that will be meaningful to the prospects/donors while also making the engagement work of the development officer rewarding.

The standard agenda to the individual strategies sessions will be outlined as follows.

- I. Updates from Previous Strategies Reviewed – 5-10 minutes
- II. Review 2-3 New Written Strategies – 10-20 minutes each
- III. Review of Actions Items – 5 minutes