

IN-HOUSE PROFESSIONAL DEVELOPMENT
FOR ADVANCEMENT

#AItraining



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LEARNING OUTCOME

After participating...

...you will be able to assess training and professional development needs across all levels of staff.



■ AGENDA

- Identifying training needs across all levels of advancement staff
- Developing an in-house professional development program
- Getting started at your institution

■ REFLECTION

“A passive approach to professional growth will leave you by the wayside” ~ Tom Peters

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IDENTIFYING TRAINING NEEDS ACROSS ALL LEVELS OF ADVANCEMENT STAFF



SEASONED PROFESSIONALS

COMMON CHARACTERISTICS

- Management opportunities
- Transformative gifts (job of a lifetime)
- Ability to mentor
- High level committees
- Interest in recognition or role modeling

TYPICAL TRAINING NEEDS

- Individual or personalized training/coaching
- Understanding of administration and campus complexities
- Management/Union/H R deep dives
- Higher level projects or sub committee involvement
- Inclusion



TRANSFERABLE HIRES

COMMON CHARACTERISTICS

- Community or alumni engagement
- Committed to learning and professional development
- Time (don't hire if you can't commit)

TYPICAL TRAINING NEEDS

- Campus 101
- Ongoing check ins, staying on track
- Nuances of campus culture
- Nuances of development work
- Focused management

GROWTH HIRES

COMMON CHARACTERISTICS


- Hungry
- Opportunity to shape
- Professional development
- Skill building
- Best practices
- Write your ticket
- Also take time, make sure you have it!

TYPICAL TRAINING NEEDS

- Fundraising Essentials
- Cohort or milestone
- More regular performance enhancement or review conversations
- Consistent feedback
- Stylistic

**TRANSPLANT
HIRES**

COMMON CHARACTERISTICS	TYPICAL TRAINING NEEDS
<ul style="list-style-type: none">• Impact of skill sharing or best practices• Role modeling• Community immersion• Fitting in	<ul style="list-style-type: none">• Campus 101• Cultural Immersion

 **ACADEMIC IMPRESSIONS** 9

**AUDITING YOUR EXISTING
PROFESSIONAL DEVELOPMENT
PROGRAM**

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■ UNDERSTANDING THE WHY

- Retention builder
- Performance issues
- Maturity of team
- Evolving culture
- New leadership
- Campaign (pre/during/post/ramp up)
- Inspiration/motivation/re-charge
- Other?



■ UNDERSTANDING THE TIMELINE

- Change agent
- Team by team
- Progressive
- Aligned with strategic plan, vision and goals
- When it happens



■ HOW MUCH
INPUT DO YOU
NEED/SEEK

- Leadership-driven initiative
- Team feedback
- Team ownership

■ WHERE ARE
PEOPLE
SPENDING
THEIR TIME

TIME VS. PROFESSIONAL DEVELOPMENT

- Time allocation issue?
- Job description issue?
- Expectations issue?
- Clarity of roles?
- Cultural issue?

■ IS IT TIME
FOR A TIME
REALITY
CHECK

HOW MUCH TIME IS ALLOCATED TO:

- Active fundraising?
- Passive fundraising?
- Donor relations/stewardship?
- Management/leadership?
- Strategic thinking?
- Meetings?
- Things that should be delegated?



■ RESOURCE
AUDIT

- Dedicated dollars
- Allocated FTEs
- Alignment within your own shop/annual fund/HR/business development/school of business/school of education/student affairs/associated students
- 10% assignments/project work
- Commitment of leadership team
- Commitment of culture



■ SHORT
TERM/LONG
TERM

- A critical element is auditing both for short term and long term....and planning on an evolution
- It always takes longer than you think!



TAKEAWAYS

**An audit is a journey, not a
check of the box. Plan to
plan, review and adjust!**

SOLUTIONS TO ENHANCE RETENTION



■ WHAT ADVANCEMENT PROFESSIONALS SAY THEY WANT

- Strong leadership
- Feeling valued/part of the team
- Ability to contribute to metrics/goals
- Flexible schedules
- Management growth
- Professional development
- Access to technology
- Opportunity to make a difference/be successful!





POLL

Do your current professional development opportunities enhance fundraiser retention?



OLD TRICKS, WHAT ORGANIZATIONS ARE DOING

- Performance bonuses
- Telecommuting
- Flexible or reduced schedules
- Additional support or access to staffing
- PTO for volunteer and community engagement



OLD TRICKS, WHAT ORGANIZATIONS ARE DOING

- Providing tools that get fundraisers out the door
- Tuition reimbursement
- Professional development
 - Conferences
 - Coaching



NEW TRICKS...COULD THESE WORK FOR YOU?

- Retention bonuses
- Individualized fundraising coaching
- Site visits
 - Like-minded groups
 - Peer groups
- Technology
 - Phones
 - iPads
 - Laptops
 - Docking stations, etc.



■ NEW TRICKS...COULD
THESE WORK FOR
YOU?

- Favorites forms
- Fund me awards
- Prize patrols
 - Example: fantastic
- Catch me doing something right
- Recognition
- 10% time contracts (personal/professional)



■ NEW TRICKS...COULD
THESE WORK FOR
YOU?

- Education
 - Internal speaker series
 - Roleplaying
 - Jeopardy (also a social/team building exercise)
- Employee stewardship
- Career plans
- Creative titles
- Access to leadership and top volunteers
- Sabbaticals





RESOURCE

Favorites Form



DON'T FORGET THE GRATITUDE

**“WHAT KINDS OF RECOGNITION DO YOU
PREFER FOR MEETING AND/OR EXCEEDING
PERFORMANCE GOALS?”**

- Recognition by direct or senior manager: 69%
- Annual cash bonus: 68%
- Increased management responsibilities: 40%
- Better job title: 35%
- Recognition by development colleagues: 24%
- Recognition by administration and volunteers: 23%
- **Recognition by donors**

Source: The Advisory Board, 2015





? QUESTIONS

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DEVELOPING AN IN-HOUSE
PROFESSIONAL DEVELOPMENT
PROGRAM

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RIGHTSIZING OUR EXPECTATIONS

CFO asks CEO: "What if we invest in developing our people and they leave?"

CEO: "What if we don't and they stay?"

Peter Baeklund
Resourceful Leadership



RECOMMENDED ONGOING TRAINING EXERCISES

GENERAL INSTITUTIONAL TRAININGS (ONE-TIME)

- Your institution, 101
- Managing in a union environment
- Working with administrative staff
- Staffing of leadership, deans and faculty



**RECOMMENDED
ONGOING TRAINING
EXERCISES**

**TECHNICAL TRAININGS (ONE-TIME, WITH
REFRESHERS AS NEEDED)**


- Gift acceptance
- Gift fees
- Naming policies
- Endowment policies
- HIPPA
- FERPA

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**RECOMMENDED
ONGOING TRAINING
EXERCISES**

ANNUAL TRAININGS


- Admissions, financial aid/scholarship distributions
- Athletics
- Annual meeting with chancellor/president and vice chancellor/provost
- Deans' panel
- Performance reviews


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CREATING ONGOING TRAINING PLANS


RECOGNIZE NEEDS BOTH AT TEAM & INDIVIDUAL LEVEL

- Annual plans
- Career plans
- Reviews
- Roundtable conversations
- Check in calls
- Hallway chatter
- Data
- Ask!!

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 **CHAT**

What other tactics have you found successful in uncovering ongoing training needs?

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BEST PRACTICE

- Ensures expectations are consistent
- Builds common language
- No questions about roles
- Allows for two way conversation
- Assists with recruitment and retention

POWERFUL PRACTICE ENVIRONMENT

- Realistic situations
- Coaching and feedback
- Time for self-reflection
- Guidelines and ground rules
- Low risk environment
- Focused repetition and practice

Source: Education Advisory Board



RESOURCE

Sample Progression Plan | *Fundraising Track*

Current Position: Admin III/Specialist

Desired Position: Assistant/Associate DoD



RESOURCE

Sample Progression Plan | *Research/Prospect Management Track*

Current Position: Admin III/Specialist

Desired Position: Research Analyst



COHORT MODEL

- Small, focused and strategic
- Supports culture
- Allows you to be nimble
- Builds team while strengthening skills
- Easy to rotate/change



COHORT CONSIDERATIONS

- Strategy
- Moves management/upgrading of donors
- Management
 - Philosophical
 - Technical
- Career development
- Principal gift
- Planned giving
- Donor relations
- Other?





RESOURCE

Strategy Cohort Overview



MICHIGAN MODEL

MAJOR GIFT OFFICER CURRICULUM

- Six month program
- Applicants must:
 - Actively manage a portfolio
 - Been a frontline fundraiser for at least 6 months
 - Be willing to participate in a collaborative learning environment




**MICHIGAN
MODEL**

**MAJOR GIFT OFFICER CURRICULUM |
OBJECTIVES**

As a result of completing this program,
participants will have the knowledge and skills
to:

- Effectively manage and execute all steps of
the donor cycle
- Accelerate their ability to deliver desired
results (visits; asks; closed asks)


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**MICHIGAN
MODEL**

**MAJOR GIFT OFFICER CURRICULUM |
OBJECTIVES (CONTINUED)**

As a result of completing this program,
participants will have the knowledge and skills
to:

- Establish relationships with senior leaders
- Cultivate a deeper awareness of and
involvement with the broader University
- Identify a defined path for continued
professional growth and development as a
major gift officer

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RIVERSIDE MODEL

- Identify up and coming staffers
- VC meets with cohort every six weeks
- Discusses:
 - Leadership decisions
 - Industry trends
 - University issues
 - Donor strategies
- Builds a value investment where staff feel like insiders



MIT MODEL

- Management meets regularly with managers to assist high “flight” risk employees
- Special focus is given to MGO staff with 18-24 tenure



■ MIT MODEL

- Pay particular attention to:
 - Compensation
 - Sense of commitment to the institution
 - Family or other community attachments
 - Likelihood of being recruited
 - Desire to retain them

■ ITHACA COLLEGE MODEL

- Case studies to analyze scenarios
 - Facilitated discussions
 - Next steps and lessons learned
- Essential elements
 - Scenarios are general yet challenging
 - Strong facilitator
 - Steps are concrete yet actionable

HARVARD MODEL

- Role playing
 - Prep
 - Filming
 - Viewing
 - Feedback

ROUNDTABLES

- Brings staff who would not normally cross paths
 - Vary levels
 - Unit size
 - Responsibility and tenure
- Discusses key issues with a social component

■ ROUNDTABLES

- Provides an open forum within a safe zone
- All questions are encouraged
- Value add that builds culture and provides feedback/trends and information otherwise not heard at management level



■ EXTERNSHIPS

PLANNED GIVING EXAMPLE

- Talented staff member interested in planned giving
- Likes being in her unit (and a hard unit to fill)
- Created a partnership with PG office
- 4 month/50% commitment
- Training component for others
- Played to strengths, no cookie cutters




■ INTERNSHIPS

- A grow your own model
- Allows student leaders to take an active role in the development culture
- Supports diverse culture
- Key projects assigned
- Better outreach to younger alums
- **Goal:** transition top performers to a entry-level admin or front line role

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**ESTABLISHING COACHING & MENTORING
MODELS THAT WORK**

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COACHING ELEMENTS

- Individual coaching
 - Build excitement
 - Pick the right partners/personality/role modeling/fit
 - Career plan
 - Timeline
 - Roles and expectations
 - Clearly stated outcomes
 - Methods for evaluation
 - Feedback



MENTOR MODELS

- Perk or growth opportunity for mentor
- Bring mentors together
- Definition of model and expectations
- “Contract”
- Minimum time at institution for mentor
- Homework/assignments to mentee
- Clearly focused outcomes
- Role modeling to all





? QUESTIONS

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GETTING STARTED AT YOUR
INSTITUTION

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■ SETTING
TRAINING
EXPECTATIONS

- Training or coaching is a partnership
- Training or coaching is an investment (value proposition)
- Utilize for milestones (additional conference or site visit)



■ SETTING
TRAINING
EXPECTATIONS

- Conference attendee planning, tracking and presentations back on campus
- Discuss participation, and expectations
- Builds loyalty
- Build into your job offers and performance reviews



■ TIME FOR TRAINING & PROFESSIONAL DEVELOPMENT



- Understand your *why*, and reaffirm that others agree
- Build it in to every group meeting/leadership discussion (even 15 minutes makes a difference)
- Two things
- Find a champion to keep you honest (or to take this on)

■ GETTING STARTED

- Block one hour within the next week to reflect, and set three goals to get you started, enhance or refine your PD program
- Determine best way to access your current program/needs (audit, survey, conversation with leadership)
- Identify natural partners
- Break in to bite size pieces
- Begin to move the needle



TAKEAWAYS

- Build your program to match the needs of your team
- Look at greatest needs or foundational opportunities first
- Set short term and long term goals, and move/adjust the needle as needed.
- Work with your natural partners in building a program



TAKEAWAYS

- Look at both individual and unit/team professional development for greatest return on investment
- Audit both existing resources and budget opportunities
- Provide “project work” to grow your program
- Be creative and have fun!



QUESTIONS



EVALUATION

Thank you!

Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.

<http://www.surveymonkey.com/r/72TLFKW>

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