Developing the Next Generation of Fundraisers

Nonprofit Fundraising Conference
July 19, 2017
Presenters & Agenda

Lorie Humphrey  Vice President, Human Resources and Office Operations
Evan Johnson  Director, Regional Development
Brikkelle Thompson  Director, Organizational Learning & Talent Operations

Agenda:

- Talent Development Overview
- Associate Development Officer Training Program
- Talent & Leadership Development Evolution
- Question & Answer Session
Talent Retention & Succession Planning

Talent Strategy

Talent Philosophy

Differentiate Talent

Development Approach
UMF Associate Development Officer Training

*University-wide Programs and Services*
UMF Regional Development Overview

• 11 major gift officers working in 5 different regions around the nation - 6 development officers, 4 associate development officers

• Growing program:
  • FY13 fundraising - $2.5 million, FY17 - $10 million

• Work collaboratively with development officers in collegiate units

• Sole central fundraising team (with exception of Medical School & medical research) in decentralized operation
• Talent shortage - there are more development jobs with less qualified applicants to fill those jobs in the Twin Cities and around the country

• Create a talent pipeline - build the bench

• Establish the “University of Minnesota” way of fundraising through standardized training to create a more collaborative internal culture
Program - Objectives

• Deliver a best-in-class Associate Development Officer (ADO) training program that provides fundraising principles and on-the-job training to build the development talent pipeline for the U of M fundraising enterprise

• Evaluate ADOs to measure level of performance success or continued training

• Utilize training program to deepen development/campus partnerships, and leverage broader experience

• Increase prospect pipeline by focusing training on qualification visits
Current Program Overview

• Training program began in January 2013
• Since inception, 23 gift officers have successfully completed the program:
  • 1 current Director and 1 Sr. DO currently at the U
  • 8 current DO’s at the U
  • 2 current DO’s at other institutions
  • 11 current ADO’s at the U

• Existing program starts on week two for a new ADO

• Training Plan
  • Weeks 2-4 include classroom training covering 16 PowerPoint presentations & role play
  • Months 2-4 include ride-alongs in the field
Essential Question

HOW DO WE CREATE A PROGRAM THAT DEVELOPS BETTER MAJOR GIFT OFFICERS MORE QUICKLY?

• Focus on the fundamentals
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<td>ADO Training Program Overview</td>
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<td>Advancement Structures</td>
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<td>Identifying Prospects</td>
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<td>Qualifying Prospects</td>
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<td>Securing Appointments</td>
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<td>After the Visit</td>
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*Utilize rotating faculty for curriculum classes*
## Revised Program – Timeline

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<th>TIMELINE</th>
<th>ACTIVITIES</th>
<th>NOTES</th>
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</table>
| Weeks 2-6 | • In-class curriculum 101 | Faculty includes:  
• Regional DOs  
• LAGO Director  
• Unit/Program DO/ADOs |
| Months 2-4 | • In-the-field training |  
• Potentially engage other units/programs  
• Length of training varies based on professional experience |
| Months 3-9 | • Case study examples 102 |  
• Programming provided by various units/programs  
• Include both successful/unsuccessful gift examples |
| Months 10-12 | • Mentor assignments |  
• Align mentor with career progression outside of direct report |
Core Themes During Training

• Development is part art and part science - we focus on the science during the classroom portion and accelerate learning the art through hands-on training.

• Development officers are paid for their judgment - how do we use the classroom and in-field trainings to help new development officers hone judgment more quickly?

• Create an upfront contract with constituents. There is only one answer to, “What is your job?”… “My job is to raise money for…” We raise money by building relationships, matching philanthropic interests with organizational needs, etc.

• Use 3rd party stories when working with prospects to illustrate your points and better relate to their lives.
Measuring Success

• Career progression
  • # of ADO to DO positions

• Key metrics of graduates (unit-based)
  • $ raised
  • Qualifications
  • Solicitations

• Satisfaction of graduates
Talent & Leadership Development at the University of Minnesota Foundation
Talent Management is a set of integrated organizational processes designed to attract, develop, motivate, and retain productive, engaged employees. The goal of talent management is to create a high-performance, sustainable organization that meets its strategic and operational goals and objectives.

Source: Bersin and Associates
Talent Management at U of M and UMF

Adapted from Bersin and Associates
Talent/Employee Development Philosophy Needed

- Develop Leadership Competencies to define “how” we effectively lead
- All employees design own Individual Development Plan using leadership competencies in partnership with supervisor
- Organization engages in Talent Review to succession plan key roles and accelerate development of top talent
Leadership –

The Competencies and Behaviors that Matter

A working definition of leadership in organizations is that it is the ability to influence people to work productively with others to accomplish broader organization objectives.
UMF’s leadership framework describes **how** effective leaders act.

“Leading with Purpose: A framework for defining leadership and individual success”
UMF’s Leadership Competency Model

Leadership *effectiveness* is related to the combination of an individual’s skills, personal attributes, and motives – and can be organized or described in a competency model.

The UMF Leadership Competency Model was developed with input from leaders at the Foundation and across the University-wide development community.

The competencies specify the important knowledge, skills, abilities, traits, and motivations that are required of effective leaders today. It includes:

4 Factors
12 Competencies
Talent Development Philosophy: Leadership Competencies
Leadership competencies are the *observable* and *measurable* knowledge, skills, abilities, and behaviors needed for individual performance and organizational success.

Important for *developing and retaining talent*.

UMF’s Leadership Competency framework provides behavioral descriptors of *what it means to be an effective leader*. 

*Whether an individual contributor or a manager of a team, every member of UMF is a leader.*
Leadership Pipeline

Technical Skills and Leadership Expectations

Individual Contributor

Director/Manager

Senior Leader
<table>
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<tr>
<th>Competency</th>
<th>Sr. Leader</th>
<th>Director/Manager</th>
<th>Individual Contributor</th>
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<tbody>
<tr>
<td><strong>Strategic Thinking</strong></td>
<td><strong>External Focus:</strong> Expands others’ thinking; conveys a well-developed understanding of economic and political trends, evolving donor expectations, key regulations, University philanthropy, and University of Minnesota priorities.</td>
<td><strong>External Focus:</strong> Demonstrates an understanding of UMF’s business model, important economic, donor, key regulations, and other factors affecting University philanthropy, relevant to their team’s role.</td>
<td><strong>External Focus:</strong> Considers the broader context within which their work is performed (e.g., UMF mission, vision, and values, other UMF teams, donors or University departments).</td>
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<td><strong>Long-term Perspective:</strong> Helps others recognize the long-term implications of their decisions and plans on UMF’s business model or strategies, donors, University philanthropy, engagement, etc.</td>
<td><strong>Long-term Perspective:</strong> Ensures the team considers the future impact of their decisions and plans on UMF’s business model and priorities, other teams, talent engagement, etc.</td>
<td><strong>Long-term Perspective:</strong> Recognizes the future impact of own decisions and actions on others.</td>
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<td><strong>Innovate:</strong> Recognizes and acts on opportunities to enhance the value drivers of the Foundation, incorporate changes to less model or technologies, or otherwise make the Foundation financially thrive</td>
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<td><strong>Innovate:</strong> Understands the value drivers of the Foundation and supports and fosters continuous improvement.</td>
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<td><strong>Business Acumen</strong></td>
<td><strong>Tradeoffs:</strong> Effectively balances costs versus benefits and trade various opportunities for the Foundation and its various constituencies.</td>
<td><strong>Tradeoffs:</strong> Helps the team identify and think through costs, benefits, risks, and opportunities to evaluate and optimize decision making.</td>
<td><strong>Tradeoffs:</strong> Considers the risks and benefits of various opportunities.</td>
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<td><strong>Performance Metrics:</strong> Establishes financial, operational, and other metrics to measure progress, outcomes, and effectiveness of decision making</td>
<td><strong>Performance Metrics:</strong> Identifies key performance indicators (KPIs) and monitors the financial and operating performance of the Foundation, compared to historical and organizational, and other benchmarks to measure progress towards achieving strategic goals.</td>
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<td><strong>Analysis and Decision Making</strong></td>
<td><strong>Analysis:</strong> Analyzes complex problems and opportunities fully and objectively</td>
<td><strong>Analysis:</strong> Datadrives to understand the root causes of issues and accurately determine costs, benefits, and risks.</td>
<td><strong>Analysis:</strong> Collects and analyzes information to better understand issues and opportunities.</td>
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<td><strong>Insight:</strong> Recognizes patterns and connections, draws well-reasoned conclusions, and effectively communicates findings to stakeholders.</td>
<td><strong>Insight:</strong> Recognizes patterns and connections in information, draws well-reasoned conclusions and skillfully brings ideas forward in a timely manner to senior leaders.</td>
<td><strong>Insight:</strong> Recognizes patterns and connections in information and knows when to bring ideas forward.</td>
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<td><strong>Judgment:</strong> Effectively balances when to push for more information with the need to make a sound and timely decision with incomplete information.</td>
<td><strong>Judgment:</strong> Helps the team engage in information gathering and analysis to make timely, well-reasoned decisions.</td>
<td><strong>Judgment:</strong> Engages in information gathering and analysis to make timely and logical decisions.</td>
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**Competencies**

The strengths & talents that make the difference between good and great.

**Demonstrated Behaviors**

The behaviors that will set the standard for success at UMF.
Every employee has an Individual Development Plan (IDP) based on UMF Leadership Competency Framework

IDPs: State goals/activities to develop “the how”

• Employee Development is the continuous process of acquiring new knowledge and skills that relate to one’s profession, job responsibilities, or work environment.

• Individual Development Planning (IDP) is about creating and monitoring actions that build on strengths, enhance areas that need improvement, prepare high performers for new assignments or roles and grow leaders.
UMF’s Continuous Performance Management Guiding Principles

Employees are supported through ongoing conversations with the supervisor that allow for open and honest dialogue to occur about performance outcomes, impact and career goals.

The professional wellbeing of the employee is supported through coaching and development, within the framework of UMF’s Leadership Competencies.
Provides a vehicle for open dialogue on career aspirations and development.
Provides clarity of expectation, accountability and responsibility.
Encourages individuals to take more responsibility for their own development.
Helps to attract and retain staff, particularly when linked to career progression.
Assists with talent and succession planning – identifying the requirements and clarifying how employees can develop.
Enterprise Talent Review: Ready the Organization for Succession Planning

Why?
Understand leadership readiness for mission critical roles and/or levels and identify talent gaps for organization

How?
• Leverage valid tools to assess leader performance and potential
• Reach agreement as a leadership team on leader readiness
Career Highlights

Tenure at UMF: 6 years
Length in current position: 1 year (15 months)
Career progression at University: DO, Cancer; Director of Development, Cancer; CDO, ____________

Key Accomplishments (Past 12-24 Months)

1) Strong track record leading teams with progressively increasing production goals

2) Shortly after promotion to CDO, led blending of two teams with strong leadership and change management skills

Susan Sample – Chief Development Officer, ____________
Leadership Competencies

Enterprise Talent Review:
Ready the Organization for Succession Planning

Payoff?

- Shared understanding of leadership readiness
- Senior leader insights and cross-functional partnership to accelerate leadership development
- Enhanced leadership readiness at critical leadership levels
FY18 and Beyond:
For U-wide Development Community:

Talent development planning applying Leadership Competencies, consulting services and tools
Talent Development Evolution: Recap

- Talent/Employee Development Philosophy Needed
- Develop Leadership Competencies to define “how” we effectively lead
- All employees design own Individual Development Plan using leadership competencies in partnership with supervisor
- Organization engages in Talent Review to succession plan key roles and accelerate development of top talent

➢ Up Next: Embed Talent Development Philosophy system-wide
Q & A Session
Thank you!