



Formalizing Professional Development Conversations

Talent Review Training for Advancement Managers

Advancement Forum



Katie Stratton
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MORE FROM KATIE

Maximizing
professional
development
without leaving
campus >

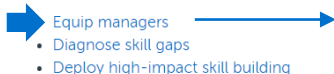
The Professional Development Playbook

A toolkit to target skill building and maximize advancement staff performance

Toolkit | August 1, 2016

Advancement shops work hard to train their staff and then stop. 79% of the MGOs we interviewed in our research project rated professional development as a significant factor in their decision to join their current employer, but development opportunities stop at the end of the hiring process.

To prevent their MGOs from leaving, advancement shops need to create continuous and ongoing opportunities for professional development. Design and implementation of the related resources have been designed by advancement and directors of strategic talent management to ensure professional development programs to ensure



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Imperative 1: Equip managers

Traditionally, senior leaders, managers, and fundraisers neglect professional development because it is detached from both organizational and individual goals. Formalizing professional development raises it to a strategic priority and ensures it gets the attention it deserves. At the same time, managers and fundraisers require tools to hold conversations that are accountable and forward-thinking.

- **Step 1:** Formalize professional development

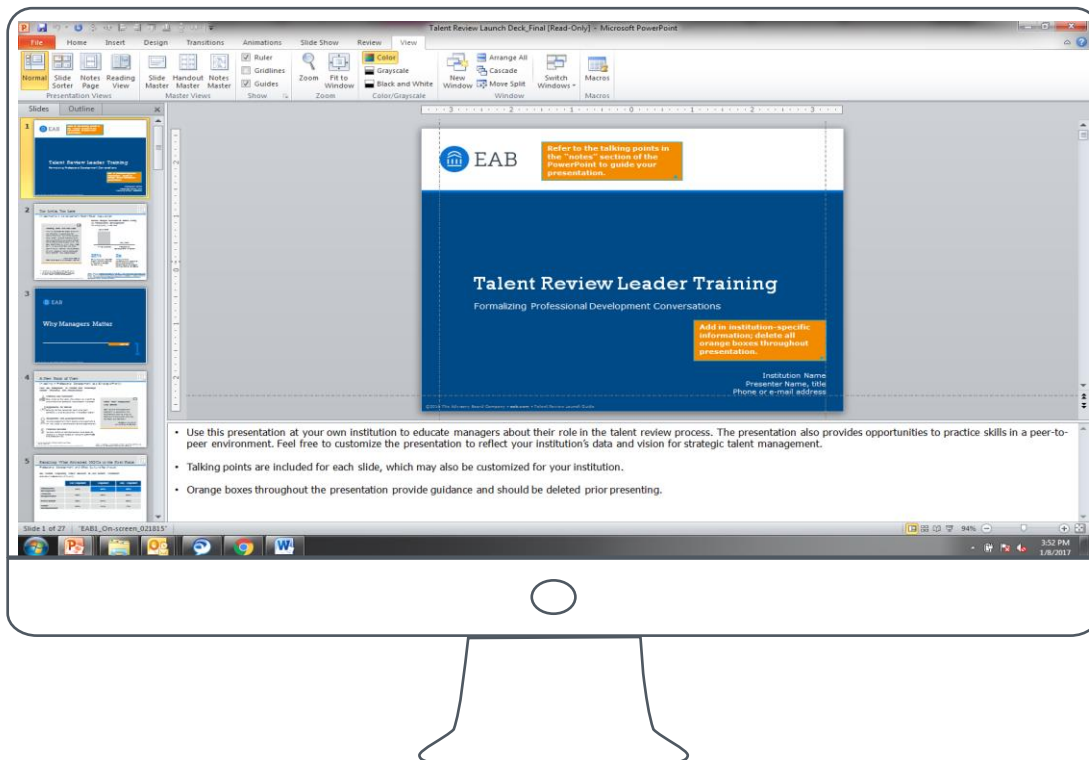
- Tool: Strategic Decision Guide
- Tool: The Talent Review Launch Guide
- Tool: Talent Review Leader Training Deck

- **Step 2:** Facilitate talent conversations

- Tool: Talent Review Critical Conversation Guide
- Tool: Talent Review Template
- Tool: Career Map Template

The Talent Review Leader Training Deck

Equipping You to Tailor This Presentation for Your Own Team



Too Little, Too Late

Investments in Advancement Talent Favor Acquisition

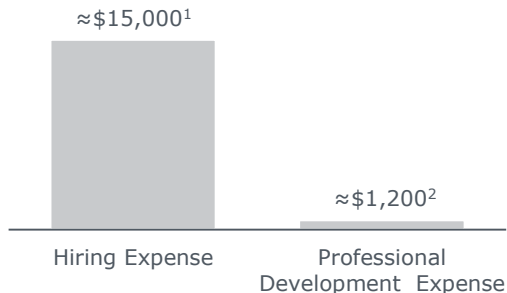
Waiting Until It's Too Late

"While nonprofits often plan 6-12 months in advance for recruitment of new employees, they often ignore professional development and career growth for current employees until it's too late—that is, until they need to fill a role and realize they don't have internal candidates, or until people leave because their growth has stagnated."

Monisha Kapila
Stanford Social Innovation Review

Annual Budget Allocated to Direct Hiring vs. Professional Development

Per employee, in dollars



25%

Of surveyed nonprofit organizations do not allocate a budget for training

2x

Amount that corporations spend on development as a percentage of budget compared to nonprofits

- 1) Includes direct costs of hiring including staff time for interviewing, excludes opportunity and vacancy costs
- 2) Estimated per person budget based on a 1% allocation of overall budget for professional development.

Source: Burk P, *Donor Centered Leadership*, 140 (2013); Burk P, *Too Busy To Learn How to Lead*, March 21, 2014, <http://www.burksblog.com>; <http://www.trainingmag.com/2013-training-industry-report>; Kapila M, *The Business Case for Investing in Talent*, Stanford Social Innovation Review, May 7, 2014, http://www.ssireview.org/blog/entry/the_business_case_for_investing_in_talent; Advancement Forum interviews and analysis.



Why Managers Matter

SECTION

1

A New Point of View

Investing in Professional Development as a Strategic Priority

Four Key Categories of Factors that Encourage Worker Efficiency and Effectiveness¹



Intrinsic Job Fulfillment

Challenge of the work, the creativity it permits, and amount of personal satisfaction it affords



Opportunity for Growth

Change for the worker to learn and grow personally and to advance in the organization



Recognition and Accomplishments

Acknowledgement from peers and superiors of an individual's contribution to the organization



Financial Rewards

Various forms of compensation and benefits, especially those based on worker's performance and productivity



Treat Your Employees Like Donors

"Our talent management program is based on the foundation that we should treat our employees the way we treat our donors."

*Brittany Wilhelm
University of Denver*

1) Often considered in the formulation of strategic human capital practices

Recalling What Attracted MGOs in the First Place



Professional Development and Office Culture Top the List

Key Factors Impacting MGOs' Decision to Join Current Institution¹

EAB 2014 MGO Survey (n=1,217)

	Not Important	Important	Very Important
Professional Development	14%	43%	36%
Financial Compensation	18%	43%	34%
Office Culture	18%	37%	36%
Tuition Reimbursement	19%	11%	7%

1) MGOs asked: "How important were the following factors in your decision to join your current institution?"

Managers Make or Break Talent Strategy

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

Drivers of Engagement¹ Influenced by Managers

1. My manager stands up for the interests of my unit/department
2. My most recent performance review helped me to improve
3. My manager is open and responsive to staff input
4. My manager communicates messages that my coworkers need to hear, even when the information is unpleasant
5. My manager helps me learn new skills
6. I have helpful discussions with my manager about my career
7. I receive regular feedback from my manager on my performance
8. My manager helps me balance my job and personal life

”

“Premature departures of fundraisers can be traced to poor relationships with immediate managers.”

*Path to the Profession
CASE Currents 2012*

”

“All the calls I get from people who want jobs are calling because they have complaints about their current managers.”

*University Foundation President
Research University*

1) Advisory Board Company Survey Solutions Employee Engagement; 24 total drivers of engagement; eight of ten related to manager effectiveness



Fundraising Outranks Manager Fundamentals

Promotion is Achieved By Excelling at Fundraising... Not Management

The Fastest Runner Becomes the Coach

“One of the primary leadership challenges in advancement is that we often promote high-performing fundraisers into management positions, without providing them appropriate training and coaching to develop the essential management skills they often lack.”

*David Unruh
SVP for Institutional Advancement
Drexel University*

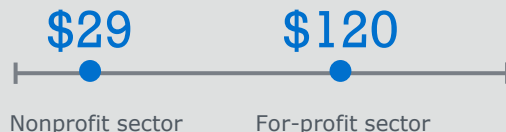
The Need for Strong Teachers

“We need to make sure our managers are not only competent fundraisers, but teachers at heart who engage in holding effective conversations, sharing feedback, and coaching their direct reports.”

*Missy Ryan
Senior Director of University Development
Clemson University*

Few Resources Dedicated to Manager Development

Per-person spending on leadership development



57%

Of fundraising directors had no training before assuming their first management job

Source: Kapila M, "The Business Case for Investing in Talent," Stanford Social Innovation Review, May 7, 2014,

http://www.ssireview.org/blog/entry/the_business_case_for_investing_in_talent; Burk P, "Too Busy Leading to Learn How to Lead," March

21, 2014, <http://www.cygresearch.com/burksblog/donor-centered-leadership/leadership-training-723/>; EAB interviews and analysis.



Strengthening Communication

SECTION

2

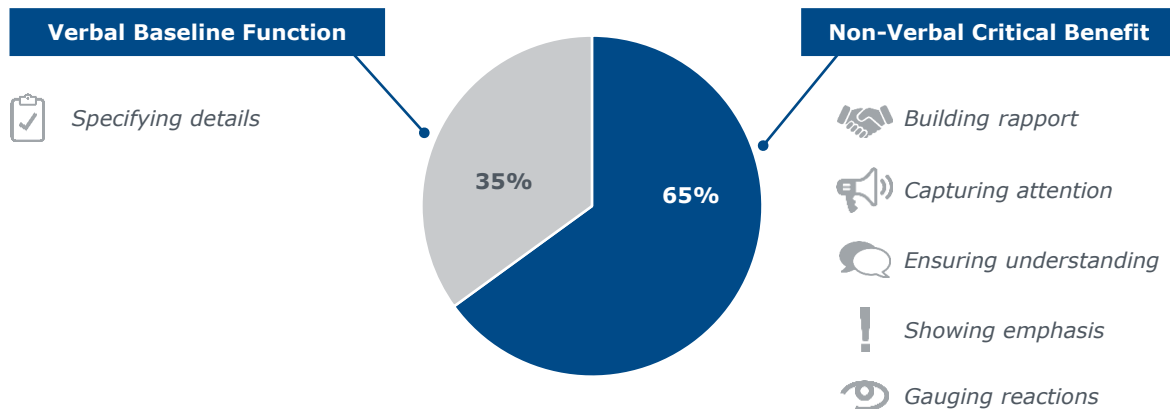
Effective Communication a Pillar of Management



It's Not Only About What You Say

Meaning Conveyed by Communication Type

Verbal vs. Non-Verbal



How You Say It Does Matter

Engaging in Two Different Types of Conversations

Conversation #1

Exercise Instructions

Step 1: Pair-up with someone next to you.

Step 2: One of you will be asked to share a problem you are currently experiencing. It might be with a direct report, a manager, a donor, etc.

Step 3: Partners should use the questions on the right to discuss what's going on with the problem.

Questions to Employ

- What is your problem?
- Why is this happening?
- What are the causes?
- Has it happened before?
- Why can't/haven't you fix it?
- Why do you think is this still a problem?

Practicing Experiential Learning

Engaging in Two Different Types of Conversations

Conversation #2

Exercise Instructions

Step 4: Stay in the same pairing and discuss the same problem, but use the questions you see on the right to guide your conversation.

Step 5: Debrief.

Questions to Employ

- What would you like to see happen?
- What would success look like?
- Reflecting on your past experiences, can you think of a moment when you experienced this outcome, at least in part?
- Why do you feel that was successful?
- What do you think we be the best way to move forward now?

Key Learning Outcomes

1. Recognizing what you do or say has an impact on direct reports.
2. Understanding how subtle changes in language and word choice change the interaction.

A Two-Way Street – Prioritizing Listening

Effective Feedback Requires Listening, Not Just Talking

“For many people, the answer to the question ‘what’s the opposite of talking?’ is waiting to talk. Many think that not speaking when someone is talking is the same as listening. Hearing people’s words in only the beginning. Do you also hear their fears? Their intentions? Their aspirations?”

Susan Scott
Fierce Conversations

Assessing Your Level of Listening



Internal Listening

Focused on your own thoughts, even while pretending to focus on the other person



Focused Listening

Focusing on the person, but only in listening to the words, not ascribing value to nuances



360° Listening

Being attuned to what is and is not being said, body language, pauses, and energy

Three Strategies for Improving Listening Skills



Make time in your day



Make eye contact



Ask better questions

Developing Constructive Conversations

Training at King's College London Focuses on How to Deliver Feedback

Feedback is Fundamental

"Feedback in the workplace is fundamental for helping those who wish to improve performance, reach an objective, or avoid unpleasant reactions to their efforts. Without feedback, how could we test the reality of our perceptions, reactions, observations, or intentions?"

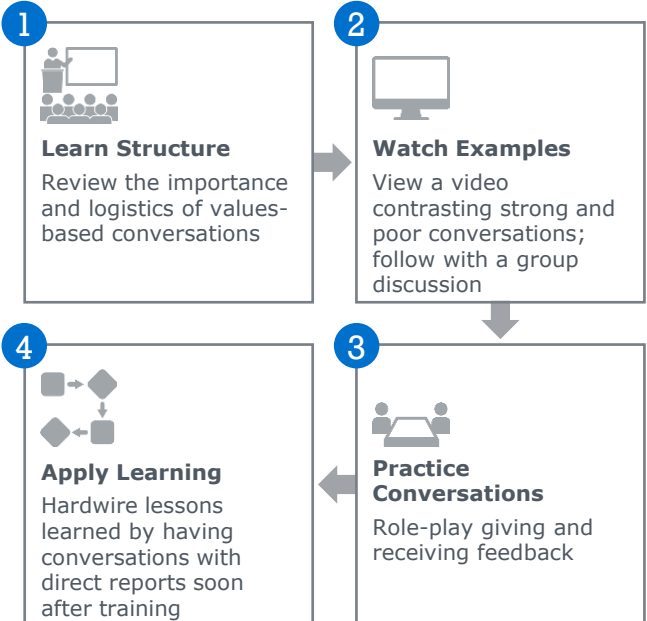
Charlie and Edie Seashore, NTL Institute

A Pillar of Relationships

"As a manager, feedback is one of your main tools – if you don't sharpen it, you're not going to have a strong relationship. Both the manager and the fundraiser lose out."

VP of Development, Public University

Feedback Training Session Process



97%

Of the advancement team at KCL strongly agree or agree that their feedback and ideas are valued by their managers

Offering Effective Feedback

How to Participate in the Group Discussions

Tips for Giving Effective Feedback

- ✓ Focus on specific behaviors
- ✓ Use precise examples
- ✓ Check for understanding
- ✓ Be realistic
- ✓ Provide colleagues with new ways of looking at a situation

Tips for Receiving Feedback

- ✓ Ask questions if you do not understand
- ✓ Accept that multiple approaches may work in a given situation
- ✓ Recognize that feedback is for everyone's benefit, even if it is aimed at another fundraiser

Using Different Types of Feedback



Positive Feedback

- Reinforce preferred behaviors
- Build on what already works well so that weaknesses fall away
- Formula: behavior + impact



Constructive Feedback

- Improve less-effective behaviors
- Aim for one to two core takeaways for each fundraiser
- Formula: behavior + impact + alternative positive behavior



Listening Helps Frame Feedback

“When you said (insert actual comment or language here); I heard or saw (insert what you observed), and from the observation I (insert the conclusion or inference you made based on the behavior).”

Giving and Receiving Feedback

One Last Communication Exercise

Conversation #3

Exercise Instructions

Step 6: In the same pairing as the earlier conversation, practice giving and receiving feedback based upon your earlier conversation. Take a look at steps seven and eight below, and take five minutes to write down one piece of constructive feedback and one piece of positive feedback for your partner related to the questions below.

Step 7: Those who asked the questions during the previous conversations should begin by asking for feedback. Start the conversation by asking: “based on our first conversations, what impact did my line of inquiry have on your willingness bring a problem to me in the future?”

Step 8: Those of you sharing a problem will ask for feedback. Start that conversation by asking: “based on our first conversations, what did you notice about my ability to effectively communicate my problem to you?”

Key Questions to Consider Before Sharing Feedback

- 1) Is this comment grounded in specific circumstances?
- 2) Is this comment objective?
- 3) Does this comment communicate impact or consequence?



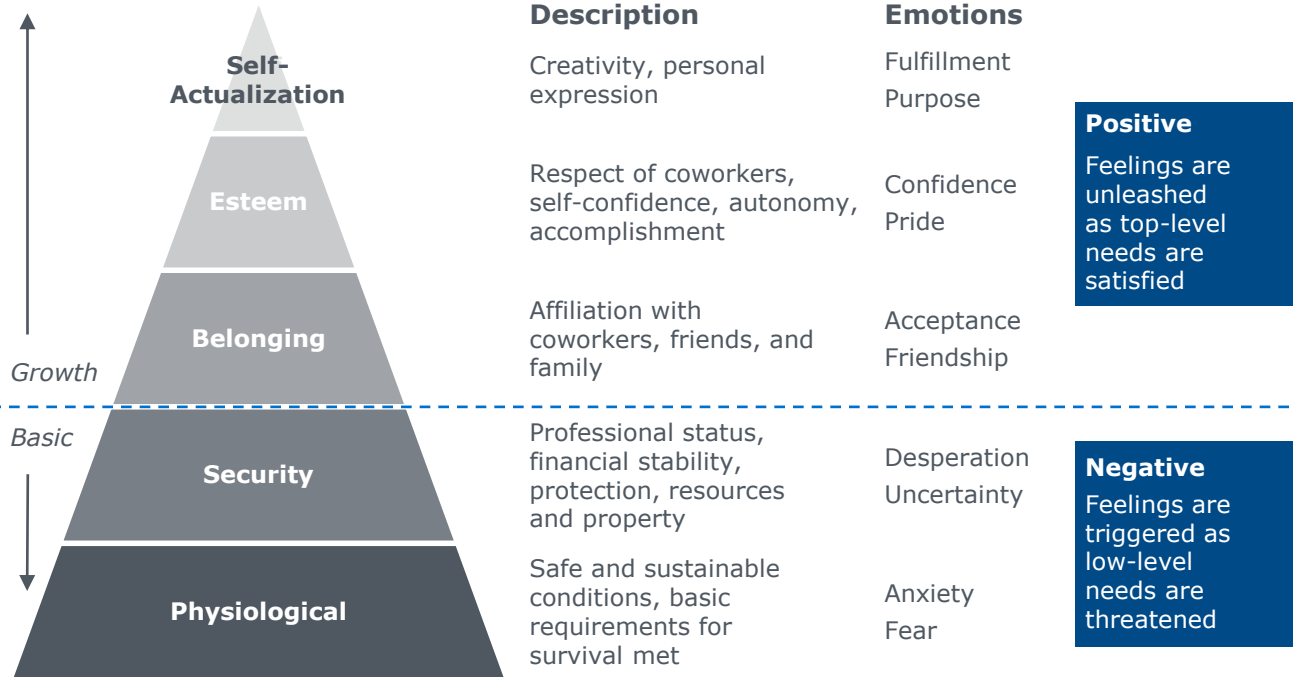
Prioritizing Talent Review Conversations

SECTION

3

What Does My Team Care About?

Considering a Taxonomy of “Motivators”



Source: McGregor, D. *The Human Side of Enterprise*, New York, McGrawHill, 1960; Kroth, M., "Maslow—Move Aside! A Hueristical Motivation Model for Learners in Career and Technical Education," *Journal of Industrial Teacher Education*, 2007, vol. 44, n0.2., pg. 5-36; Steer, B. *Becoming an Effective Classroom Manager*, Albany; NY, State University of New York Press, 1988, 3 Steps to Motivating Your Team: Cultivating the Will to Perform, Advisory Board Talent Development.

Cracking Motivation's Code

A Strategic Approach to Understand an Individual's Motivations

Unleash Aspirations



Tap into deep values to unlock higher-order performance

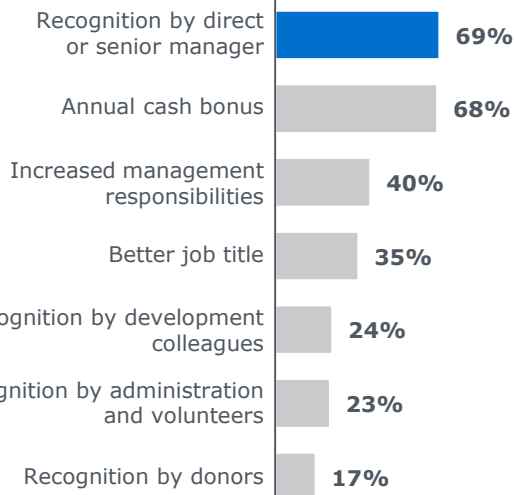
Motivated State Characterized by:

- Energy
- Enthusiasm
- Creativity
- Resourcefulness

MGO-Preferred Forms of Recognition

EAB 2014 MGO Survey

n=1,217



Relieve Frustrations



Remove fundamental dissatisfies to reduce anxiety and resistance

Resistant State Characterized by:

- Avoidance
- Procrastination
- Discontent
- Apathy

1) Response to question "What kinds of recognition do you prefer for meeting and/or exceeding performance goals?"

Cultivating Manager-Direct Report Relationships



Talent Review Creates Space for Connection, Purpose, and Accomplishment

Cultivating an Ethic of Connecting



Appreciate the Whole Person

Learn the different sides of your staff—their hopes, fears, goals. See them as a ‘person’ not a ‘function’

Facilitate Team Camaraderie

Create opportunities for staff to develop friendship and trust with colleagues

Create Opportunities for Collaboration

Get staff working together to understand coworkers’ contributions and to help them feel valued by peers

Co-Creating a Ethic of Fulfillment



Unleash Self-Expression

Invite staff to express themselves by doing meaningful work in service to the organization

Harness Their Gifts

Create opportunities for staff to align their role with their greatest areas of strength

Support Their Dreams

Remove work-related barriers so staff can achieve extra-vocational goals

Creating a Sense of Accomplishment



Hardwire Wins

Create achievable tasks that support professional development, and structure work so progress can be realized

Give Ownership

Empower staff to make decisions and take greater responsibility for the success and direction of their work

Foster Growth

Offer new challenges that give the ability to build and master different skills and areas of knowledge

Taking a Forward-Looking Approach

Understanding Career Aspirations and Goals

Reviewing Performance vs. Reviewing Talent

Performance Review

Retrospective

- Evaluates ability to meet goals in the previous year
- Discusses achievements
- Points out areas for growth based on past performance

Talent Review

Prospective

- Discusses career aspirations, current likes and strengths
- Creates an understanding of the past and the present to create a roadmap for the future
- Conversations form the basis of a career development plan

“Ownership of professional development between fundraisers and managers should be 50/50.

It can’t simply be top down. Employees have to take a stake in this. They need to ask for professional development.

At the same time, managers and organization have to ask about employee interests and offer opportunities that align individual and institutional goals.”

*Jon Derek Croteau, Ed.D.
Executive Director, Alumni
Relations and Development
Northwestern University*

Timing and Logistics

- Conducted annually
- Managers responsible for completing talent review with provided form

Introducing a Tool of the Trade

Helping Managers and Employees, One Conversation at a Time

Talent Review Form and Probing Questions Jumpstart Dialogue



Talent Review & Career Development

Professional Background/Current
Career Progression:

Current Responsibilities/
Position/Competencies - Likes &
Strengths:

Challenges & Preferred
Leadership/Supervision Style:

Future Responsibilities/
Position/Competencies:

Areas for Professional Growth:

Sample Questions

What do you like about UF/your department/your role? I see your strength as ___. Would you agree with that? What other strengths help you do your job well? What do you see as your skill gaps?

Is there a process/procedure that makes your day-to-day difficult? Other roadblocks?

Everyone likes to be managed differently, what style do you work best with? How can I better support you?

What's the next step in your career path? Where do you see yourself in 1 year, 5 years, 10?

What do you feel are your self-assessed gaps in knowledge, skill, ability? What information would you like to master that will give you confidence to reach your goals?



PD Playbook, p. 24-27 or download via eab.com

Practicing the Basics

Laying the Foundation for a Strong First Talent Review Conversation

Part One

Exercise Instructions

Step 1: Pair up with someone next to you (someone different than the first exercise). One of you will ask the questions, and the other will answer. Be yourselves to make it a real conversation.

Step 2: Using the first three parts of the Critical Conversation Guide:

- Professional Background
- Career Progression, Current Responsibilities, Position, and Competencies
- Leadership

Take 10 to 15 minutes to learn more about your colleague. Take notes using the Talent Review Template.

Step 3: Switch roles, and employ the same line of questioning for the next 10 to 15 minutes.

Talent Review Critical Conversation Guide

Talent Review Critical Conversation Guide

Creating a Vehicle for Focused Manager Conversations

Instructions: Talent review is an opportunity for managers to hold focused conversations with their direct reports as it relates to their work experience and career aspirations. This conversation guide is designed to aid you as you conduct talent review conversations with your team. A copy of the Talent Review Template is available on p. 26 and should be completed across the course of your conversation.

1. Professional Background and Career Progression

- Talk to me about your education. Where did you earn your undergraduate/graduate degree? What was your major?
- Walk me through (or remind me about) your professional background and career.
- Why did you choose to come to the university or college?
- Why did you choose to work with this advancement team?

2. Current Responsibilities, Position, and Competencies

- Likes**
 - What does the employee like about their position/unit/organization right now?
 - What met their expectations and what did not?
 - What do you like about our location (city, state)?
 - What do you like about the university or college?
 - What do you like about the advancement shop here?
 - What do you like about your department or role?

Strengths

- What current knowledge, skills, and abilities does the employee possess?
- Do they feel they are able to utilize their strengths in their current role?
- I see your strengths as _____ Do you agree with my assessment?
- What other strengths assist you in doing your job well?
- Do you have any unique skills that add value to your department?
- Are there any additional strengths you would like to add to this list?

Challenges

- What are the challenges the employee faces in their position?
- Is their unit?
- In the organization?
- Is there any process/procedure in place that makes your day-to-day job difficult?
- What are other roadblocks, if any, that you face?
- Is there anything that can be done more efficiently in your department? Within our shop?

Source: University of Florida, Gainesville, FL
Reprinted: University of Florida, Gainesville, FL

▶ PD Playbook, p. 24-27 or download via eab.com

Source: Values Based Conversations at Work (2014), VBA Consulting; Barsh, J., Centered Leadership: Leading with Purpose Clarity and Impact, McKinsey and Company; EAB interviews and analysis.

Uncovering Aspirations and Areas of Growth

Laying the Foundation for a Strong First Talent Review Conversation

Part Two

Exercise Instructions

Step 4: Continue the conversation, employing the next two areas of the Talent Review Critical Conversation Guide:

- Future Responsibilities, Positions, and Competencies
- Areas for Professional Growth

Take the next five to 10 minutes to learn more about your colleague in this area. Take notes using the Talent Review Template.

Step 5: Switch roles, and employ the same line of questioning for the next five to 10 minutes.

Step 6: Debrief

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- What are other roadblocks, if any, that you face?
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Source: University of Florida, Gainesville, FL
McKinsey & Company, Inc. © 2014

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Source: Values Based Conversations at Work (2014), VBA Consulting; Barsh, J., Centered Leadership: Leading with Purpose Clarity and Impact, McKinsey and Company; EAB interviews and analysis.

Co-Authoring a Career Map

Action Steps and an Individual Development Plan Codify MGO Aspirations



Career Map

Professional Goal(s) (3-5 Years):

Action Items:

Professional goals and career aspirations made explicit; helps manager and employee think about what's needed

IDP serves as both a planning and accountability mechanism for the next talent review; manager and employee agree on what success will look like and when it will be complete

Individual Development Plan (IDP):

Opportunities for Professional Growth/ Competency Development / Learning

Competency/ Experience	Tactics/ Resources Needed	Success Criteria	Time Frame
List skill gaps	How are we going to address those gaps?	What is needed?	When will this be complete?



PD Playbook, p. 28 or download via eab.com

Creating An IDP



Mapping a Path for Ongoing Development and Skill Building

Part Three

Exercise Instructions

Step 7: Based on your respective talent review conversations, you will now engage with one another to help identify your top three professional goals for the next three to five years.

Start with the simple question, “based on our conversation, if you have to outline three professional goals for yourself that you feel you could work toward, what would they be?”

Step 8: Take the last 15 minutes of this session to identify professional development objectives and actions that you can employ across the coming year to work toward those goals. Be sure to include resources that could support you.

Career Map Template and Individual Development Plan

Career Map Template
Co-authoring a Plan to Achieve Career Aspirations

Instructions: Following the talent review conversation, the employee and manager collaborate to outline professional goals with a timeline of three to five years. To support those goals in the near term, they also create an individual development plan for the coming year. The individual development plan should be revisited semi-annually and regularly updated during check-ins on progress throughout the year.

Employee Name: _____

Professional Goals

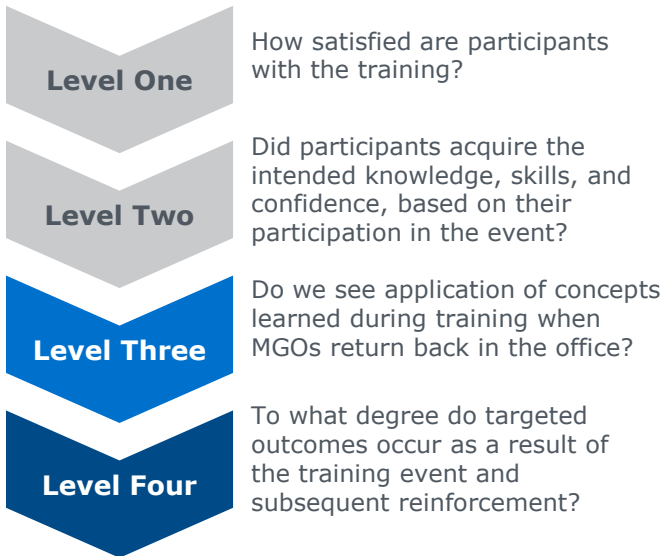
Personal Development Objectives	Actions	Timeline	Resources/Support	Metrics
What are the top or three areas of development you want to focus on in the next 12 months?	For each stated development objective, which specific actions can you take that will help you achieve your goal?	What is your timeline for completing each action?	What training, mentoring, or tools will help you to achieve this plan?	For each of the actions outlined, what will be the standard for success?
#1				
#2				
#3				
#4				

Source: Values Based Conversations at Work (2014), VBA Consulting; Barsh, J., Centered Leadership: Leading with Purpose Clarity and Impact, McKinsey and Company; EAB interviews and analysis.

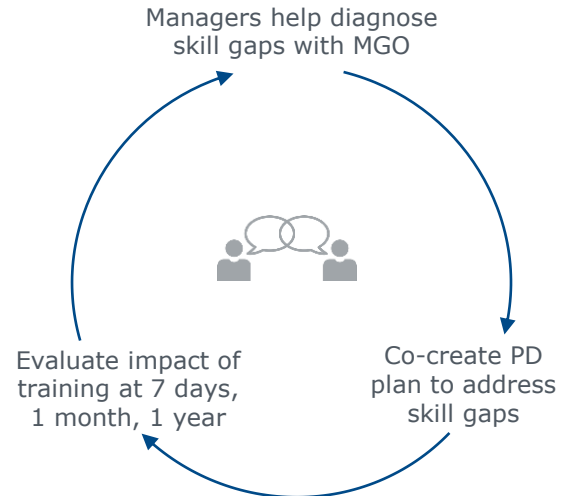
Closing the Loop

Subsequent Conversations Measure Learning, Behavior, and Results

The Kirkpatrick Model of Evaluation



Managers Best Equipped to Measure Levels Three and Four



The Case for a Different Approach to Growth

A Win-Win-Win

Impact of Professional Development



Fundraisers are more productive and stay longer...

- Professional development bolsters skillsets and leads to increased engagement
- Higher skilled workers are more productive
- Engaged fundraisers stay longer



...which means organizations raise more money...

- More tenured fundraisers raise more dollars than less tenured fundraisers
- Higher skilled fundraisers positively impact bottom line



...from donors nurtured by continuous, positive contact

- Fundraisers with strong cultivation and engagement skills form deep relationships
- Donors enjoy long-term relationships with their MGOs