Effective Talent Management in Higher Education

A Strategic Guide for the Advancement Office
About the Project

We partnered with Blackbaud’s Higher Education Executive Advisory Board (EAB) to learn how higher education institutions of all sizes and structures are thinking about talent management strategies in their advancement offices. In this whitepaper, we’ll hear from leaders at Brown University, Dickinson College, Texas Christian University, University of Guelph, University of North Texas, UNLV Foundation, Virginia Military Institute Alumni Agencies, and Wake Forest University about how they hire, retain, and train top talent. You’ll be provided with their insight and Blackbaud research to help you develop a successful approach to talent management.

Research: Reeher, Powered by Blackbaud

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What is Talent Management?

Talent management encompasses the hiring, training, goal setting, and retention strategies managers use to develop high-performing teams. In the higher education advancement office, a thoughtful talent management strategy directly impacts the ability to do good fundraising work. With the right people doing targeted work, institutions are better able to meet their fundraising goals.

Optimizing an institution’s talent management strategy requires assessing current processes and mapping them to future goals. Here’s where to focus in order to develop a process for the future.

Taking the Institution’s Temperature on Talent Management

An institution’s size, location, and priorities all affect its approach to talent management. In many ways, the talent management strategy that engages staff and delivers results for the institution will reflect its unique culture. To study talent management more closely, it’s best to assess based on three components common to a large range of different institutions:

1. Gift officer activity
2. Management processes
3. Program investment

In all types of institutions, advancement executives have control over at least one, if not more, of these areas. Examining an institution within this framework is a way to compare its talent management strategy across a wide range of different institutions, as the chart below illustrates:

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Gift officer activity
Some institutions have very loose guidelines for gift officer activity, while others follow strict processes. Advancement leaders can drive results in this area by prioritizing certain activities.

Management processes
Advancement leaders can affect change by adding management processes to standardize how work is completed.

Program investment
Reallocating resources between the different processes or staffing within advancement will change results.

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We are grateful to the Blackbaud Higher Education Executive Advisory Board members who participated in this report:

Brown University, Dickinson College, Texas Christian University, University of Guelph, University of North Texas, UNLV Foundation, Virginia Military Institute Alumni Agencies, and Wake Forest University. Our goal is to share talent management best practices, as well as real-life solutions to issues colleges and universities face around hiring and retaining employees.
Finding the Right Talent for Now and the Future

After an honest assessment, it’s time to hire for future performance. Getting the right people in the door and keeping them there is critical to success. For example, if the advancement department has chosen to improve fundraising results by increasing their management processes, they’ll need to hire for the future, e.g., gift officers who are accustomed to tracking their activity using metrics.

The majority of EAB members report that they spend a substantial amount of time each year to find the right candidates and retain current employees. Hiring and retaining employees goes hand-in-hand with program investment and program processes. Here’s how to do it:

Assessing Need

The more strategic the hiring manager can be when they’re starting the hiring process, the more successful the institution and the prospective new hire will be. Hiring managers generally have a vision of the type of person they’d like to find for a vacant position. However, it’s best practice to revisit official job descriptions during each re-hire. Ask: does the position need to be adjusted to meet the institution’s changing needs? Is the position description written in a way that will attract the right candidates?

Have senior-level management review each position before publicly posting a job description. In many cases, an open position is a great opportunity to assess if changes could help the fundraising team be more successful. Although they may not be intimately familiar with the position’s day-to-day tasks, senior management can ensure that the position is aligned with the institution’s future goals.

Defining the Desired Skills and Experience

Referencing institutional goals during the hiring process can illuminate the skills and experience the institution needs most. Some institutions need independently driven gift officers to be successful, while others require gift officers who are comfortable working within a framework of processes, measurements, and benchmarks.
For some, a new hire may be a time of departure from long-time staffing balances and a move to new processes. For example, hiring the institution’s first prospect researcher and re-training gift officers to use this research data in visits. Or, for an institution who’s struggling to make first-time donor visits a priority, perhaps a departure in the back office frees up resources to hire another gift officer instead of a replacement. For moments of institutional change, it’s especially important to hire people with the right skill set and temperament for the challenge.

**Finding the Right Talent**

A well-thought out job description is only part one of the process. Once the position is posted, it’s still a challenge to find the right candidates. The EAB contributors feel that it is a job seeker’s market. Some institutions struggle to offer their preferred candidates’ competitive salaries and consistently lose talent to other higher education institutions and area nonprofits. For others, qualified candidates are not even consistently applying. Having a strategy for finding the right candidates and understanding what they value in an offer is key to building a strong team in the face of outside pressures.

**Recruiting External Talent**

The EAB respondents have years of experience finding qualified candidates in their unique markets. They’re hiring in big cities and in smaller towns. Their institutions are well-known, or niche. They’ve discovered that several internal processes help them to find the right candidates in this competitive market. For some institutions, it helps to cast a wide net. “It’s easier for us to recruit nationally than locally,” says Scott Roberts, President of the UNLV Foundation and Vice President for Philanthropy and Alumni Engagement for UNLV. Some institutions have been able to find the right candidates by not requiring relocation. “We’ve experimented with remotely located employees and regional gift officers—that’s worked for us,” says Tim Snyder at Wake Forest University.

For other institutions, refining their outreach to local talent has been critical. “We’re expanding our talent pool by participating in diversity and inclusion initiatives,” says Jeanne Pecha, Vice President of Advancement Services and Development Support, Brown University. “Part of that work has included becoming an Aspen Leadership Group diversity partner in a groundbreaking talent management effort to enhance the professional growth and career success of current and aspiring advancement professionals from diverse, under-represented and non-traditional backgrounds.”

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**Best Practice: Use the Job Description to Define the Role Before Hire**

“Instead of a job description, I develop a position prospectus. I challenge myself and my staff to write out what success looks like in that role. We create line items: what skills are critical? What kinds of intangible qualities might a successful candidate have? With whom will this person work? What competencies must this person have? And finally, what critical objectives will this person complete and what results will follow?”

– Tim Snyder, Associate Vice President, Alumni & Donor Services, Wake Forest University

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Dickinson College has also made an effort to develop relationships to get recommendations for great candidates. “Our most recent hires have come from recommendations from staff members,” says Jessica Jones, Associate Vice President, College Advancement. “We’ve been growing our prospect pools internally and expanding our networks for future open positions.”

Growing Internal Talent
As Dickinson College’s example indicates, external talent searches often dovetail with internal recruiting initiatives. Intuitions should not overlook the power of growing their own talent. The college has built a system of gift officer career opportunities to encourage career growth and retention. “We have entry-level regional gift officers who report to senior gift officers. These senior gift officers work in a mentorship capacity, but this responsibility is by choice,” says Brian Falck. “It’s possible to be a senior gift officer with or without management responsibilities.” Dickinson College has examples of staff who have decided to stay on after they were presented with opportunities to advance at the institution.

Having an intentional talent pipeline is especially important for institutions looking to hire candidates with very specific backgrounds or values. “By default, we have to grow our own talent,” says David Prasnicki, Vice President and Chief Financial Officer of Virginia Military Institute Alumni Agencies. “They need to have military knowledge and understand our uniqueness.”

Like the Virginia Military Institute Alumni Agencies, the University of North Texas specifically develops relationships with current students as a way to cultivate advancement talent. “We have a nonprofit leadership degree and we recruit students to work for us after they graduate,” says Clint Shipp, Executive Director of Advancement Services. “I teach a class and I know the students and I can predict what kind of workers they’ll become. Many of our students are non-traditional and their maturity and career stage matches up with our open positions. In addition, we partnered with University of North Texas Career Services to develop an internship program to give students real world experience in fundraising while creating a pipeline for our talent pool. Both our traditional student workers and interns have gone on to become effective fulltime employees, both in our support services and frontline fundraising positions.” Building a pipeline can help alleviate some of the stress of finding qualified candidates, whether the institution is competing with big employers in an urban area or struggling to attract candidates to a small town.
Highlighting the Right Incentives to Secure the Right Candidate

Once the advancement team has found the right candidate, framing the job offer to them becomes important. Especially, if the institution has tightly regulated salary bands. As Jeanne Pecha at Brown University notes, “We’re trying to stay competitive with salary, but that’s not all what it’s about. We find that an inclusive organizational culture, along with supporting an employee’s work-life integration, are important factors for our candidates.”

For institutions who are kicking off a new campaign, undergoing process changes, or implementing new management strategies, the vision of what the team wants to achieve together can be an important selling point for mission-driven new hires. For other candidates, a career move is an opportunity to do meaningful work while leaving previous stressors behind. “We push quality of life and cost of living to highlight our area,” says Brian Falck at Dickinson College. “People like to bring themselves back from the brink of destruction by leaving major cities to settle down with us. But they still have train access.”

Institutions have also sweetened the deal for their preferred candidates by helping them find job placement for a spouse, assisting with relocation, offering a signing bonus, highlighting their benefits, or offering career advancement assistance. Regardless of location or size, institutions can attract candidates who are aligned with their missions by emphasizing community, culture, and shared opportunities.
Developing Onboarding, Training, and Goal Setting Programs

Onboarding is the new hire’s very first experience with the institution, but sometimes this process is hastily thrown together, or neglected. However, a carefully planned onboarding process can help new employees adjust quickly, learn key information, and begin contributing to the team faster. Creating a good onboarding program as well as periodic check-ins and trainings throughout an employee’s tenure is critical for keeping them engaged. When team members lose engagement, or sense a lack of investment in their careers, they’re more likely to move on. Creating strong programs to support in this area is important for institutions of all types.

Starting with a Strong Onboarding Process

During a gift officer’s first 90 days, they should receive institutional orientation, as well as tools, procedure training, and if possible, a mentor-mentee relationship. During this time period, they’ll also get their first portfolio assignments and initial goals. Institutions with strong management strategies connect gift officer behavior to desired organizational goals. Clear goals help gift officers succeed in their careers and understand how their work drives larger outcomes.

If the new gift officer is filling a vacant position, thoughtful management strategies can ensure that prospective donors don’t fall through the cracks. Research indicates that 43% of prospects remain unmatched even after a new gift officer arrives. Additionally, the average gift officer tenure is 3 years, but it takes an average of 4.9 years to secure a major gift from a donor. Building a smooth transition strategy keeps donor relationships moving forward and limits the impact of a departing officer while the new officer is ramping up to speed.

Setting and Tracking Gift Officer Goals Together

Strong gift officer management strategies make goal setting a collaborative process—having regular check-ins with each officer is a good retention strategy. For gift officers who are struggling, it can be an opportunity to help them get what they need to succeed in the role. For those who are out-performing their roles, check-ins can start a conversation about new responsibilities and opportunities. Since on average, seasoned officers are 2.5x more effective than new ones, it’s important to retain them. Using check-ins and goal setting helps create a healthy, productive environment that incentivizes officers to stay on for new opportunities and continue positively benefiting the organization.
Retaining Top Talent

The EAB members get creative to retain top talent. They reported a focus on crafting career growth opportunities, offering incentives around remote work, providing mentorship opportunities, and paying for conference attendance. For many, this activity tracks with efforts they make to grow internal talent.

“At Dickinson, we have the ability to be more flexible with territories and responsibilities as as gift officers mature in their careers,” says Brian Falck. “This is a retention tool we use to make our top performers happier and more productive in their jobs.” Similarly, at University of Guelph, carefully crafted career pathways help solidify veteran leaders. “We’ve developed a career trajectory from alumni managers to development managers to senior development managers,” says Duncan Malcom. “We see high turnover amongst alumni managers, but better retention for senior positions — so this is an area of focus.”

“To help us retain talent, we’re bringing in additional resources, strengthening our relationships, building momentum to finish out the campaign, and highlighting external opportunities for career growth. Internally, we’re trying to change culture and moral.”

— Jeanne Pecha, Vice President of Advancement Services and Development Support, Brown University

How to Manage Gift Officers for Career Satisfaction

1. Create gift officer goals that roll up into large-scale objectives. We recommend goals around first-time visits and proposals to maximize dollars and donors.

2. Track gift officers’ progress towards their goals and schedule regular check-ins. On-going discussion can help officers who are struggling get what they need to succeed and can help identify high performers who may need additional responsibilities.

3. Develop and showcase career trajectories to help gift officers and others envision themselves at the institution long-term.

4. Use mentorship programs to teach early-career gift officers and bestow mid-career gift officers with more responsibilities.

Taking an Institution’s Talent Management Strategy Forward

Great fundraising teams share a sense of commitment to their mission which fuels their work together. It takes time and purposeful effort to create a framework where people are inspired to do their best in pursuit of a common goal. The EAB contributors have demonstrated some of the many ways talent management can be developed to best serve the college or university.

As this whitepaper indicates, talent management is a long-term endeavor that dovetails with the growth and sophistication of an institution’s advancement objectives. Any changes in gift officer management should tie into strategy around larger fundraising goals. As fundraising leaders look to the future of their organizations, developing a talent management strategy will be a crucial step towards meeting their objectives.