Building and Sustaining High Performance Teams: A Management Model for Success

2016 UNC System Advancement Symposium
Winston-Salem State University
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Executive Director
Advancement Resources & Strategic Talent Management
Boston University
What We Will Cover

• Trends in talent management
• Finding, Growing & Keeping your Staff
• Importance of Staff Engagement
• Partnership for success
• Retention Strategies
“Would I ever leave this company? Look, I'm all about loyalty. In fact, I feel like part of what I'm being paid for here is my loyalty. But if there were somewhere else that valued loyalty more highly, I'm going wherever they value loyalty the most.”
A Brief History of STM

- New to not-for-profit sector
- Emerging field in higher-ed advancement
- Intersection with for-profit sector
- Rapidly growing
- Many resources
- Many models, practitioners
A Growing Field

University of Michigan: Learning & Organizational Effectiveness; Strategic Talent Management

MIT: Strategic Talent Management; HR & Staff Development

University of Rochester: Talent Management, Employee Development & Recruitment

Northeastern: Talent Management & Organizational Development

Wake Forest: Strategy & Operations

Notre Dame: Talent and Engagement; Compensation & Recruiting

University of Florida: Talent Management, Strategy & Planning

University of Illinois: Administration & Talent Management

Princeton: Strategic Initiatives and Organization Effectiveness

USC: Learning & Performance

Northwestern University: Talent Acquisition and Resources; Talent Development

Carnegie Mellon: Organizational Development

Stanford: Learning & Performance

Caltech: Talent and Prospect Management
Talent Management is a strategic approach to managing human capital, which is an organization’s most valuable asset and usually where it invests the most.

- Organizational Development
- Resource allocation
- Values and Vision
- Assessment
- Compensation systems
It’s About People

It’s a way to find, hire, train, grow, retain and plan to develop the best quality staff there is.

- Talent Acquisition
- Onboarding (& Off boarding)
- Learning Development
- Professional Development
- Performance Management
- Career Pathing
- Succession Planning
- Reward & Recognition
Managers play an important role in recruiting, developing and retaining the best and the brightest.

- Leadership Development
- Management Training
- Coaching
- Mentoring
- Career Paths
- Internships
- Diversifying the field
- Attracting new talent to the field
It’s About ROI

A strong talent management program or approach will directly affect an institution’s goals, and contribute directly and indirectly to the bottom line.

- People Metrics
- Institutional Brand
- Compensation
- Benchmarking & Analysis
- Performance Management
- Metrics
- ROI
What are your hiring challenges?

- Compensation is not competitive
- Cultural Issues (unhealthy culture, bad managers)
- Lack of qualified talent in my area
- Little or no upward mobility for staff
- Lack of time or talent to commit to effective search
- Too much competition in my region
- Geography
- Poor process, central HR issues
## Costs of Turnover

<table>
<thead>
<tr>
<th>Number of Staff Replaced and Cost of Staff Turnover at $49,554/staff</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
</tr>
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<tbody>
<tr>
<td>16 Month Tenure</td>
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<tr>
<td>- Number of staff replaced</td>
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<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>- Total cost of staff replacement</td>
<td>0</td>
<td>$198,216</td>
<td>$198,216</td>
<td>$198,216</td>
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<tr>
<td>36 Month Tenure</td>
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<tr>
<td>- Number of staff replaced</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>- Total cost of staff replacement</td>
<td>0</td>
<td>0</td>
<td>$198,216</td>
<td>0</td>
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<tr>
<td>Cumulative Cost of Staff Replacements by end of 4th Year</td>
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<tr>
<td>- 16 Month tenures</td>
<td>0</td>
<td>$198,216</td>
<td>$396,432</td>
<td>$594,648</td>
</tr>
<tr>
<td>- 36 Month tenures</td>
<td>0</td>
<td>$0</td>
<td>$198,216</td>
<td>$198,216</td>
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</tbody>
</table>
Get the data!
### Impact of Turnover by Generation

**Length of Stay in Last Three Positions by Age Group**

<table>
<thead>
<tr>
<th>Average Length of Stay</th>
<th>Respondents' Age</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Under 30</td>
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<tr>
<td>Most Recent Position</td>
<td>1.6 years</td>
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<tr>
<td>Second Most Recent Position</td>
<td>1.8 years</td>
</tr>
<tr>
<td>Third Most Recent Position</td>
<td>1.0 years</td>
</tr>
</tbody>
</table>
Why have an STM program?

What does Talent Management mean to you?

"Talent management has helped the entire organization succeed by putting the right people in the right jobs at the right time. I have no doubt the record breaking success we have achieved is directly attributed to the talent we have on board and to have “counseled out” those who are in the wrong profession."

Scott Nichols
Senior Vice President,
Development and Alumni Relations
Boston University
Engaged Employees Say They...

TRUST the people they work for

Have PRIDE in what they do

ENJOY people they work with

CONNECT their work to their organization’s future/vision
Keeping Your Staff Engaged

Strategic Staff Planning & Assessment

Staff Engagement

Retention: Career Progression, Growth and Well Being

Recruitment, Onboarding, Training & Development
Proactive Recruitment

- A strategic approach to ensuring you identify, cultivate, hire and retain the best talent
- Requires collaboration and commitment
- Requires investment in time, staff and other resources
- Requires assessment: do your homework
- Recruiting & Retention are aligned
Assess your situation: What do you have in place now and where do you want to go?

- Resources, culture, programs, highlights, lowlights
- What is communication like?
- What are you good at?
- What have you measured?
- What does success look like?
- Organization Maturity
  - Start-Up, Turn-Around, Sustaining Success
- Organizational Structure
  - Centralized, Decentralized, Top-Down, Matrix
Everyone’s success depends on each other
Stakeholder Reality

What’s in it for ME?
Be part of something special

Welcome to Boston University's home page for advancement recruiting. We in Development & Alumni Relations (DAR) have built—and are continuing to build—an outstanding team of advancement professionals and support staff. Why? Because together, we are in the midst of an enormous challenge: the first comprehensive campaign in the history of the University.

We're thinking big

We are on our way toward raising $1 billion. And we are dramatically increasing alumni engagement in the process.

The wind is at our backs

We have the full support of President Bob Brown, who is himself an experienced campaigner. (Read more about his vision for the University in BU's strategic plan.) Our leader, Scott Nichols, is a highly respected advancement professional. The University is in excellent financial shape. We have the resources we need to get the job done.

Join the team
University of Denver Talent Dashboard

Strategic Talent Management Dashboard
Fiscal Year 2015: 4th Quarter

Talent Demographics

Total Employee Counts:
- Full-Time Employee (FTE) Positions: 62
- Positions Filled at Time of Reporting: 59
- Manager Positions Filled: 23

Gender Demographics:
- Male Employees: 18 (31%)
- Female Employees: 41 (69%)

All UA Staff:
- Male Employees: 31%
- Female Employees: 69%

UA Staff in Management Roles:
- Male Employees: 35%
- Female Employees: 65%

Ethnic Demographics:
- White: 40 (72%)
- Ethnicity Unknown: 29 (56%)
- Black or African American: 2 (3%)
- Asian / Pacific Islander: 2 (3%)
- Hispanic: 7 (12%)
- American Indian / Alaskan: 1 (2%)

CASE estimates that less than 10% (possibly as few as 6%) of advancement professionals nationwide identify with a minority ethnic group.

Although the comprehensive make-up of our staff is more diverse than average advancement offices, only 4% of UA’s staff in management roles identify with a minority group.

Culture and Employee Engagement

Employee Engagement:
- UA Overall Engagement Score: 4.21
- Commitment & Dedication: 4.55
- Effective Environment: 4.11
- Empowerment: 4.16
- Relationships & Communication: 4.07
- Rewards & Recognition: 4.20

UA’s first annual staff engagement survey was completed in the fall of 2014.

Respondents rated 20 common indicators of employee engagement (within the categories shown here) on a 1-5 scale.

Over half of UA’s workforce is under the age of 36, and nearly half of UA’s department managers are as well.

One-fifth of UA staff and one-fourth of UA department managers will likely retire or will be near retirement during the next major campaign.
Partnering for Success

- Internal Recruitment Staff, Hiring Managers, Central Human Resource Partners
- Executive Search Firms
- Peers
- People Technology
  - LinkedIn
  - Candidate Database
  - References
  - Social Media
Look in your own backyard

- Appalachian State University
- East Carolina University
- Elizabeth City State University
- Fayetteville State University
- North Carolina A&T State University
- North Carolina Central University
- North Carolina State University
- UNC Asheville
- UNC-Chapel Hill
- UNC Charlotte
- UNC Greensboro
- UNC Pembroke
- UNC Wilmington
- UNC School of the Arts
- Western Carolina University
- Winston-Salem State University
- NC School of Science and Mathematics
Partnerships Across Teams

- Invite people in
- Know what others do
- Ask questions
- Cross train, learn new skills
- Know others’ measures of success
- Go to lunch, attend training, recognize a good job
Metrics

DAR Staffing Metrics by Fiscal Year

- New Hires
- Promotions
- Attrition
Talent Acquisition

• Strategy depends on your talent acquisition goals.
  • Ensure candidates have a good experience interviewing
  • Build the candidate relationship from the first exchange

• Manage the integrity of the search process.
  • Candidates will share their experience with others
  • Interviewers want to know their voices were heard
  • Stay in touch with prospective candidates
Strategic Recruiting

- Every touch counts
- Build a pipeline
- Coach your partners
- Treat candidates like prospects
- Everyone is available
- Follow your instinct
- Back door referencing
- Nail the details
- Be transparent
- Have a process
Have a process!
Compensation

- Where are you in the market?
- What positions are a challenge?
- How important is compensation overall?
- Current Trends
Compensation Assessment

- Market analysis or salary benchmarking
- Talk to peers/network
- Call a recruiter
- Look at your resources
- Alternative forms of compensation
- Staff survey
Onboarding

- First Impressions
- The beauty is in the details
- First three months are crucial!
- Check in, check in, check in!
So much depends on making good impressions during those first days.

- Staff announcements allow all teams to prepare
- Office/cubicle space organized with tech readiness
- Schedule/calendar of activities over first week/month
- Breakfast/lunch with team, peers, etc.
- Immerse in campus culture, attend events, workshops
- Touch points over first 90 days with buddy, HR, etc.
- Programming: new leader, buddy, VP welcome
Training and Professional Development

- Have a plan
- Think outside the box
- Constantly assess; don’t assume
- If you don’t invest, staff will find someone who does
Learning Development Programs

• Employee Engagement
  – Investing in staff makes them feel valued (EVP)

• Retention
  – Reduce turnover, cost impact
  – Succession planning, career path

• Productivity
  – Staff perform better, bottom line impact

• Recruitment
  – Employers of choice offer strong LD programs
Training and Professional Development
Training and Professional Development

Staff Resources

- Staff
- Training & Professional Development
- Policies & Guidelines

Welcome to the StaffHub base for all staff resources on DAR policies, procedures, learning development, organizational structure, and more!

Staff Happenings
- NEW STAFF: Welcome to the new Leadership Gift Officer for the College of Arts and Sciences, North Carolina. To discuss, contact 607-222-5072.
### DAR Internal Training

#### DAR Training Calendar: Winter 2015/2016

<table>
<thead>
<tr>
<th>What</th>
<th>Who</th>
<th>Where</th>
<th>When</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DAR Mid Year Review</td>
<td>All DAR</td>
<td>Metcalf</td>
<td>Thursday, 1/21/16, 8:30 AM</td>
<td>Please join your colleagues for the Mid-Year review and planning meeting. No sign up required.</td>
</tr>
<tr>
<td>Planning Meeting</td>
<td>Staff</td>
<td>Ballroom, 9th Floor</td>
<td></td>
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<tr>
<td>Professional</td>
<td>Amy</td>
<td>Alumni Boardroom</td>
<td>Friday, 1/22/16, 3:00 PM</td>
<td>Join Amy to learn tips and insights on professional development resources, networking, and how these resources can enhance your skillset and career trajectory. For more information or to sign up, click here.</td>
</tr>
<tr>
<td>Development Beyond</td>
<td>Bronson</td>
<td>Alumni Boardroom</td>
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<tr>
<td>CASE</td>
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<tr>
<td>Research Methods</td>
<td>Ellen</td>
<td>Alumni Boardroom</td>
<td>Monday, 1/25/16, 3:00 PM</td>
<td>Join Ellen to learn about some of the techniques used by our research department in screening prospects that can be used by front-line fundraisers. For more information or to sign up, click here.</td>
</tr>
<tr>
<td>Fundraisers</td>
<td>Bryan</td>
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</tbody>
</table>

For any questions or if you’d like to suggest a training program, just send us an email 📧.
Managers and Leaders

- Bad Managers = High Turnover
- Many resources available
- Not everyone should be a manager
- Everyone can be a leader

“Would I rather be feared or loved? Um... Easy, both. I want people to fear how much they love me.”
~ Michael Scott, The Office
• Coaching & Feedback is crucial
• Metrics & SMART goals
• Managers must take the lead!
• Partner with HR
• Transparency
• Core competencies
• Learning & Professional Development
## Competency Area: Prospect Engagement

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
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</thead>
<tbody>
<tr>
<td><strong>Discovery:</strong> Cold calls and early meetings</td>
<td>Lack of confidence in cold calls and initiating contact with a constituent. Avoids new relationships with prospects, instead focusing on existing donors. Does not quite understand the objective and role of discovery in his/her portfolio and the development process.</td>
<td>Meets some discovery metrics set. Prefers to focus on cultivation and solicitation, at the expense of portfolio maturity. Lacks confidence in cold calls and initiating contact with a constituent and unfamiliar with strategies and tools for discovery. Could be overly reliant on and demanding of research to do the work of discovery.</td>
<td>Prefers to focus on cultivation and solicitation, but does spend time on discovery when needed to. Lacking confidence in cold calls and initiating contact with a constituent, but familiar with effective strategies and techniques. Sometimes unprepared for discovery calls.</td>
<td>Comfortable making cold calls, but may not adequately prioritize or protect time for discovery. Discovery meetings and cold calls see a strong level of success in scheduling a follow-up meeting. Periodically will identify new prospects through connections and existing relationships.</td>
<td>Regularly sets time each week for discovery and cold calls, with a 20-35% success rate in securing a visit. Discovery meetings result regularly in follow-up visits. Adept at identifying new prospects and leveraging connections to deepen the discovery pool.</td>
</tr>
</tbody>
</table>

*In Partnership with Bentz Whaley Flessner*
Career Progression

- Good managers have a plan for staff
- Hire people you can grow
- Know Thy Staff...
- If you can’t grow your staff, someone else will
Career Paths

- Communication is clear and transparent
- Identify strong and weak performers
- Organizational Structure
- Clearly defined job descriptions
- Process in place
### Gift Officer Career Map

#### Recommended Career Progression & Performance Metrics

<table>
<thead>
<tr>
<th>METRICS</th>
<th>Assistant Vice President</th>
<th>Executive Director</th>
<th>Director</th>
<th>Associate Director</th>
<th>Assistant Director or Sr. LGO</th>
<th>Leadership Gift Officer</th>
<th>Leadership Gifts Associate</th>
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<tbody>
<tr>
<td><strong>Years of Experience</strong></td>
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<td><strong>Salary Range</strong></td>
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<tr>
<td><strong>Management Responsibilities</strong></td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
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<tr>
<td><strong>Fundraising Productivity Measures</strong></td>
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<td><strong>Management &amp; Administrative</strong></td>
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<td><strong>Number of Major commitments ($100K &amp; up)</strong></td>
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<td><strong>Number of Solicitations ($100K &amp; Up)</strong></td>
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<td><strong>Dollars Raised</strong></td>
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<td><strong>Visits (face to face)</strong></td>
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<td><strong>Qualification Visits</strong></td>
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<td><strong>Planned Giving Visits</strong></td>
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<tr>
<td><strong>Recommended Portfolio Composition</strong></td>
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<tr>
<td><strong>Supervisory</strong></td>
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- Range of years of experience for each role
- Range of salary grades commensurate with role
- Percent of time spent fundraising
- Percent of time managing and doing administrative work
- Number range of commitments to successfully meet individual goal
- Number range of solicitations to successfully meet individual goal
- Number range of dollars raised to successfully meet individual goal
- Number range of visits to successfully meet individual goal
- Number range of qualification visits to successfully meet individual goal
- Number range of planned giving visits to successfully meet individual goal
- Range of prospect ratings for each level
- Team composition, reporting structure commensurate with role
Succession Planning

![Succession Planning Diagram](Diagram.png)
High Achievers

• Starting right now, what three things could I do differently that would make you enjoy your job more?

• If I were a recruiter, what would I have to offer you to persuade you to change jobs?

• What do you like about your job?
Retention for the A-Team

- Competitive compensation
- A seat at the table (impact on decisions)
- An excellent boss
- Executive coaches/mentors
- Flexible work schedules that support work/life balance
- Collegiality, fun, supportive and healthy culture
- Resources and tools needed to do their job
- Clear goals and rewards
- Community building/time to perform volunteer work
- Virtual/remote work options or work from home
Reward and Recognition

- Awards
- Stretch Assignments
- Perks
- Visibility
- Peer Recognition
- Compensation
- Professional Development
Keep it Simple

Thank You Notes 101

In the advancement world, we know the power of effective stewardship and thanking people in the most meaningful and strategic way. As managers, our staff should be stewarded with the same thoughtful and effective approach. The power of a personal “thank you” that is meaningful, heartfelt and specific is extremely effective and costs nothing more than your time and inspiration.

We have put together a few tips and examples for you to get started. Please note that while a handwritten note is very effective, a well-crafted email also goes a long way, especially when you copy a key colleague or partner.

- For a handwritten note, use stationery. Embossed cards with complementary envelopes look nice, and are appreciated.
- Personalize it: Not just in the personalized stationery, but in what you actually say. If the person has done something novel/fantastic, be specific when telling them what you appreciate and why.
- Take your time: An illegible note won’t do much good and neither will one with scratch marks all over it. Use a nice, fine point pen, so the ink won’t bleed or smudge. Traditionally, thank you notes are written in cursive. Sometimes this can look a mess if your cursive is not up to par, so use your best judgment and do what you think looks best.
- Send thanks for trivial things: Why not whether it’s for a well-handled meeting or for a professional or personal accomplishment, a hand-written note is the best way to show your appreciation.

Note Starters:

- I wanted to let you know that having you on our team makes all the difference...
- Thank you for being a dedicated and valuable employee...
- Thank you for always going the extra mile for our team...
- We have been so busy lately, but I want to take the time to tell you how much we appreciate the hard work you have done...
- Whatever the task, you always seem to get it done. I just want you to know that it has been noticed...

Here are some internet resources to help you:

Happy Staff

• Do you know what motivates your staff?
• Do you have a plan to meet their needs?
• Are you an employer of choice?
• Be prepared to be flexible
• Ask, Ask, Ask...
Retention for All

- On-boarding
- Professional development
- Leadership training
- Consistent performance coaching
- Internal job posting/promotion programs
- Career planning
- Succession planning/career progression
- Job specific training and development
- Recognition and incentive programs
- Competitive Compensation
How to Lose ‘em

• Identifying & addressing poor performance
• Managing difficult conversations
• Writing & implementing performance plans
• Partnering with HR
• When it’s time to move on...
Exit Interviews

- Capture, track & share data!
- Thank people
- Be strategic
- Boomerangs
Have Fun at Work

And we can’t stop... Raising money
Sustain Success

- Measure, assess and do it again
- Be patient
- Start small, build on success
- You will never have enough time, staff or money
- Build a Peer Network
  - CASE
  - Advancement Learning Network
  - Best Practice Resources
What does Talent Management mean to you?

"Talent management is here to stay. *Building and sustaining a high performing team is the foundation to our success.* Turning around an organization with a strategic talent management strategy has made all the difference in what we are achieving today."

**Scott Nichols**
Senior Vice President, Development and Alumni Relations
Boston University


**Donor Centered Leadership: What it takes to build a high performance fundraising team**  
Penelope Burk  
Publisher: Cygnus Applied Research Inc, 2013

**Effective Measures: The Return on Investing in Talent Management**  
Edited by Jon Derek Croteau, Ed.D.  
Publisher: CASE, 2012

**Love ‘Em or Lose ‘Em: Getting Good People to Stay**  
26 Engagement Strategies for Busy Managers  
Beverly Kay and Sharon Jordan-Evans  

**Managing Time and Energy: A Team Sport**  
Karen E. Osborne, President, The Osborne Group, Inc. Multi Media File  
Publisher: CASE, 2008  
Published: 2008

**The People First Approach: A Guide to Recruiting, Developing and Retaining the Right People**  
Jon Derek Croteau, Ed.D.  
Publisher: CASE, 2009

[http://www.humanresources.about.com](http://www.humanresources.about.com)
Thank You

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617-353-6298
abronson@bu.edu
http://www.bu.edu/dar-talent/

Special thanks to:

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Brittany Wilhelm
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University of Denver