

# Advancing Philanthropy for Gift Officer Managers

## Program Summary

Major gift fundraisers who experience success raising gifts often become managers of other gift officers. But does success in fundraising guarantee success in managing others? This program helps organizations by providing a structured learning experience for new and aspiring leaders of gift officers and advancement programs. Class sizes are limited to a maximum of 10 participants to facilitate leadership development and collaborative problem-solving.

The program is delivered over three courses and can take place on consecutive days, or over an interval of time convenient to your institution. Each course is three hours and identifies key management and leadership principles found among high-performing fundraising operations. Following each session, every participant receives one hour of individual one-on-one coaching to work through specific challenges and opportunities.

This program is beneficial for new and current managers of front-line fundraisers in academic, medical or other nonprofit settings. Participants receive a binder with the course materials, useful supplemental readings, and a complimentary copy of *Achieving Excellence in Fundraising, Fourth Edition* (2016).

## Session I: Principles of Effective Management and Leadership

### **Understanding Advancement's Role**

As a leader of others, new managers must understand, and articulate effectively to others, the role of philanthropy in their organization. The program begins with a helpful overview of key sources of research in philanthropy and nonprofit management. Participants learn how to use these resources to strengthen their management capacity.

### **Defining Personality Types**

New managers often fail by assuming that their work style was successful for them, so it should work for their new direct reports as well. Participants will learn how to identify different personality types among their current staff and potential new hires, and how best to challenge each individual to be successful.

### **Balancing Demands**

Time management takes on a new meaning for the gift officer who becomes a manager. These positions often come with their own fundraising goals and expectations, in addition to management responsibility over others with their own sets of goals. Case studies and group discussions are utilized here to help managers maximize their most valuable resource – time.

## Session II: Operational Challenges – Effective Managing in All Directions

### **Managing Up**

Senior organizational leaders rely on their advancement managers to lead their teams effectively, and to be problem solvers, effective communicators, strong mentors and above all, consistent producers. Senior leaders also need partners who can anticipate needs, plan ahead, and bring them potential solutions when problems arise.

### **Managing Down**

Part one of two on managing direct reports, participants will learn best practices in portfolio management, goal setting, performance evaluation, and fostering collaboration within the team.

### **Managing Sideways**

There are many potential partners and allies within an organization. Some within your organization may include academic affairs, marketing and communications, community and government relations, membership services, or research. This session concludes with a focused discussion on your organization's overall structure and strategies for engaging colleagues in mutually beneficial ways.

## Session III: Empowering the Potential in You and Your Team

### **Performance Metrics and Planning**

In a continuation from Session II, participants will explore case studies and work in small groups to further their understanding of effective goal setting, performance monitoring and evaluation, and developing long-term plans that support your organization's mission. This includes a discussion on creative ways to provide continual professional development to retain your top performers and assist those who need help meeting goals.

### **Operational Efficiency and Cost Control**

Raising money costs money, but in a time of limited resources, managers must be more creative. This part of the program shares ways to maximize productivity while also empowering the team to think cost-effectively.

### **Building a Culture of Philanthropy**

The program closes with a summary discussion on internal strategies to help your team become viewed as more than just fundraisers within your organization. This includes examining sample communications tools and messaging strategies that foster greater collaboration with internal constituencies.

Every participant receives a copy of *Achieving Excellence in Fundraising, Fourth Edition*, the definitive resource in applied philanthropic research.

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