

Strategies for Supporting Advancement and Development

# Doing More with Less

## ***Managing Professional Development***

*Strategies for Effectively Managing  
Professional Development and Training*



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## Managing Professional Development

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### Overview

Professional development is essential to career progression.

There are a variety of methods for managing professional development and it is important from both a professional and budgetary perspective to ensure that efforts and expenditures are effective.



Our environment is becoming increasingly more complex. Today's professionals face the challenge of needing to manage with knowledge of multiple disciplines and systems and the ever changing interrelationships between them. Life-long learning is very important.

Professional development keeps you abreast of changes in your field, and helps you to provide state of the art services to your institution and its constituents.

As a starting point, consider the following definitions of professional development, and as you read the rest of the article, try and formulate how you may need to change what happens in your own organization.

Professional development and training is a perk- budget comes from an overall pool and seems to be randomly assigned.
Professional development is a planned activity related to specific skills we need to acquire as an organization and part of our ongoing budget.
Professional development and training are carefully planned activities related to specific skills we need to acquire as an organization and part of our ongoing budget. We have an ongoing skills inventory, knowledge transfer plan, to skills acquisition strategy and all of this is integrated into our individual performance and development plans.

Another consideration - for operations/technical/support staff – we should separate the ideas of professional development and training. i.e. Professional development is an activity that enhances your knowledge of the profession and training is something that is absolutely essential to do your job on a day to day basis.

The idea of specialist vs. generalist is additionally an important consideration in looking for avenues for development and training.

*“Systems engineering is an interdisciplinary field of engineering that focuses on how complex engineering projects should be designed and managed. Issues such as logistics, the coordination*



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*of different teams, and automatic control of machinery become more difficult when dealing with large, complex projects. Systems engineering deals with work-processes and tools to handle such projects, and it overlaps with both technical and human-centered disciplines such as control engineering and project management.” Wikipedia.*

The systems approach to engineering is something that is becoming more prevalent in terms of career. We all need to work in a multi-disciplinary environment, our projects often cross organizational boundaries and we need to be conversant in many different skills.

Specialization vs. generalization also asks the question – are you a person with skills in \_\_\_\_\_ currently working in the fundraising profession, or are you a person with a great understanding of fundraising where \_\_\_\_\_ is one of your portfolio skills?



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### **Professional Development and Career Planning**

There should be a sound and well understood business process for managing professional development in your organization.

- Professional development should be directly related to an individual's career path.
- Professional development activities should have a discernable benefit to the organization.
- Both the individual and the organization need to share in the planning and accountability for professional development.
- There should be an emphasis on skill acquisition rather than a specific conference or conference location. Too often, professional development is managed as a perk rather than the skill acquisition and enhancement exercise it should be.
- Skills acquisition should be integral to the organization's strategic and operational planning cycle rather than an ad-hoc selection of activities.
- Professional development should be an integral part of the budget planning and negotiation process.
- There should be a formal appraisal and review process for all requested activities to ensure that they fit with overall organizational plans.
- Consider the need to represent the organization to its peer groups at specific conferences.
- Who has the most need for professional development activities?
- What are an individual's professional strengths, and what needs to be improved? How will staff be moved up in the organization and how will their skill development be inventoried and related to career progression?
- How does professional development enhance an individual's future leadership role?
- How will professional development lead to performance improvements for individuals and program areas?

There should be formal policies for items such as whether session attendance is mandatory, when an employee can arrive at a conference, how conference attendance relates to travel policies, whether it is acceptable for multiple staff to attend the same conference, if professional development activities are subject to an employee's probationary period etc.

Managers should have a professional development plan in place for their staff and should be responsible for helping select opportunities.



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All staff should have professional development as part of their annual performance and accountability plan and any new staff should have this information and expectations clearly outlined as part of their orientation.

***Learning Plan – what experiences, courses, on-the-job activities, professional groups, reading etc. should be done for continued development?***

- Participate on the Computing Advisory Board, BI Council and other related technology committees where appropriate.
- Participation in vendor user groups and product advisory groups once the Replacement Product has been selected. Faculty member at the Forum. Keynote speaker and Faculty Member at the user group meeting.
- Continue to take advantage of internally offered learning activities such as guest speakers, training and other events and breakout sessions.
- Continue to participate as a board member and technology chair for the Association of Advancement Services Professionals. (This will be a continued small commitment of time, usually a conference call every 2-3 weeks and helping to maintain the Association's web site.)
- Try to build a network of Advancement/Development Services professionals. There could be some potential here for speaker exchanges related to Advancement/Development services issues.
- Participate and help out at Development and/or Alumni events.  
(Probably an event every 2-3 weeks.)

The first step is to determine where the organization lacks or requires additional skills and to seek out those opportunities that contribute to the enhancement of these skills. The next step is to evaluate the costs and provide the necessary budget.

- **How do you decide what to focus on?**
  - Interests?
  - Organizational priorities?
  - Results of your performance review?
  - Chance for promotion?
  - Ad-hoc reactive needs?
  - Based on a career plan?
  - Where you think the future lies?
  - Where you eventually want to live?
  - Emotional needs?
  - Increase your compensation?
  - Path of least resistance?
  - What you need to teach others?

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### **Planning and Budgeting**

The organization should have a clear and complete understanding of the expense of these activities and how to manage them effectively.

All peripheral costs in addition to the conference fees should be included in the budget as this will give a more accurate overall picture of the total budget for these activities, and will also help provide year over year comparisons.



- Conference fees
- Airfare and other transportation costs
- Hotel and lodging
- Meals, per diem
- Miscellaneous costs
- Peripheral activities if allowed

The budget should then be developed and each budgeted item should include narrative as to why the specific activities are required.

### **Budgeting Models**

#### **Formula Dependent on Staff Level**

- Good for setting defined levels for specific groups of staff. i.e. Professional staff allocated \$2,500/yr, support staff \$500.
- Doesn't always allow for exceptions. i.e. What happens when a course for a support staff member costs \$900.
- Formula approach makes planning for activities easier because each staff member is allowed a certain amount. Also easier to administer.
- Loss in central management control as amounts are allocated to individual budgets.
- Need to decide if rollover applies. i.e. Can staff combine the amounts for two years in order to attend a national conference if the formula allocation for one year is not enough?

#### **Central Pool**

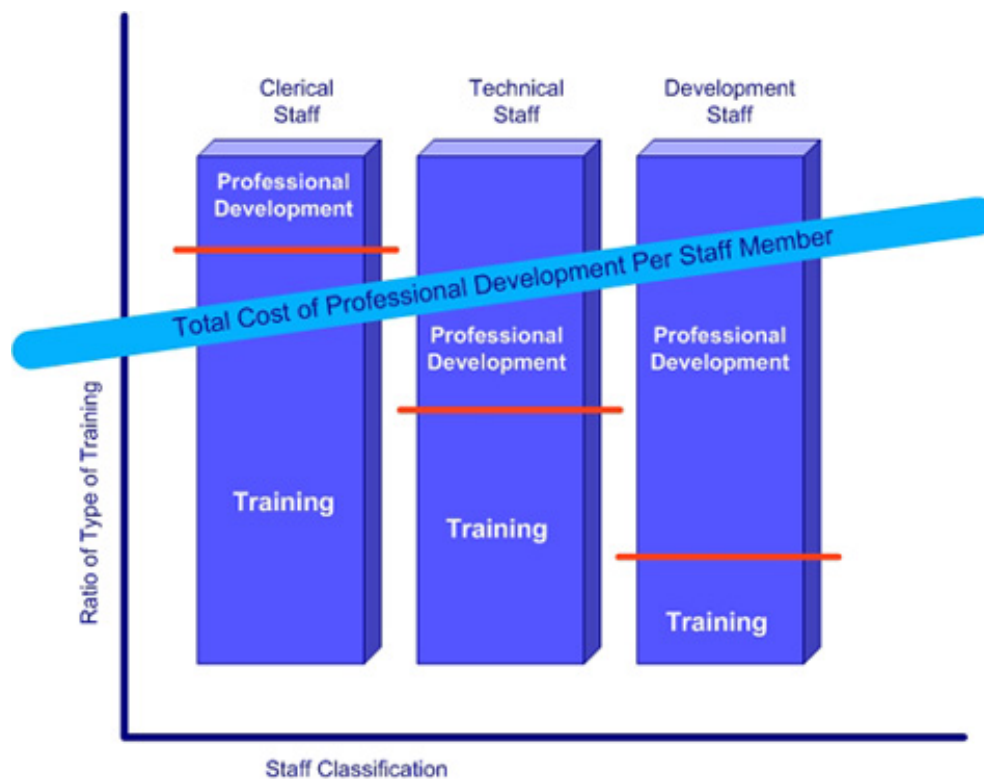
- Allows for much greater control by senior management.
- Sometimes difficult to translate specific goals to specific levels of staff because of lack of formula. i.e. What amounts should be planned for clerical or support staff?
- Staff that are under-represented in the budget process may not receive adequate amounts.

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- May create perception of unfair allocation of funds especially for staff that have a better lobbying advantage in terms of budget. Those staff that feel they don't have any lobbying ability may also feel uncomfortable asking for professional development even though they need some additional skill acquisition.
- Doesn't allow individual managers to manage their own professional development budget.

### Mix of Individual Formula and Central Pool

- Best of both worlds.
- Allows for central control and allocation from central pool for exceptions plus a degree of program area budgetary control by appropriate managers.





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### **Budgetary Controls**

Whenever you set budgetary controls you need to balance their rigidity with the recognition that most employees will engage in responsible behavior. You need to have a certain degree of flexibility. Don't have policies that are too restrictive.

- Flying in the day of the conference vs. a day or two before should be governed by whether there will be a significant enough saving to offset the additional accommodation and per diem costs. By the same token, if a flight is long, you don't want to have exhausted staff attending a conference where they're supposed to be learning. You also have to consider flight and travel delays and make sure staff can get to the conference on time.
- Flying out the day the conference ends vs. the next morning. Often a grey area in terms of institutional policies. Leaving the next day allows for additional networking opportunities and visits to peer institutions.
- Taking advantage of advance registration. Are all staff required to do this, or are valuable discounts lost because of last minute planning? The same applies to booking flights far enough in advance to get the lower fare.
- The cost of flying vs. driving and parking costs. Policies on traveling as a group.
- Car rental. Most conference activities take place at the conference hotel so car rentals are typically not necessary.
- Are peripheral activities included or is the employee required to pay for these on their own? For example, a tour of the city may be part of the conference and considered valuable for networking activities.
- Spousal or family member costs if attending. Are there additional accommodation costs which should be covered by the employee? Are there conferences where the attendance of a spouse is beneficial?
- International vs. national vs. regional vs. local conferences.
- Conference hotel vs. a nearby hotel that may be less expensive.
- Are conference included meals deducted from the per diem meal allowance?
- If travel or the conference takes place on weekend or holiday does the attendee receive equivalent time off?
- Which conferences would normally be considered mandatory and how are these included in the regular budget cycle?
- Is there a professional development allowance for contract or short term employees?

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### **Evaluating Opportunities**

There should be a recognized and understood business process for evaluation, submission and approval of opportunities.

- How does professional development fit in with other activities? For example, does the conference related to current work or future work of the employee? Does it relate to a specific project?
- Is there an alternative?
- Are staff allowed to attend the same conferences repeatedly, or do they attend different ones based on the skills they need to acquire?
- Are there staff within the organization who can do the same training?
- How do the opportunities dovetail with industry groups such as CASE?
- How are skills inventoried and recorded and how are past activities related to the current application?

### **Knowledge Sharing and Transfer**

It's important for employees attending conferences to share the knowledge they've obtained.

- Presentation to relevant staff.
- Copying and sharing of conference materials and handouts, and inclusion in the organization's resource library.
- How can acquired knowledge be incorporated into the organization's formal training and orientation processes?
- Are there policies for attendees to write an article on the conference for newsletters or other industry related media?
- Are staff required to present in their area of expertise at conferences they attend?

Sharing knowledge provides a very visible demonstration of the benefits to the organization and shows your manager the value they provided by approving your request.

### **Special Considerations**

#### **Professional Development vs. Training**

We sometimes need to separate what we deem professional development from training activities.

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Some training is absolutely required in order to do one's job, such as database training for a new system conversion.

This is different than the development one requires for their career in the advancement field.

For example, a course in report writing, vs. a CASE conference on annual fund. The first represents the mechanical aspects of the job - the second allows the individual to do the task with a much greater level of understanding.

Technical and specific industry training are both valuable, and from a planning and budgetary standpoint, these should be separated.

Training	Professional Development
Events Management Software Conference	APRA Conference
Lexus-Nexus	Board Participation
Report Writing	CASE Conference
Software Advisory Group Meeting	Telemarketing Conference
Telemarketing Software	

### **Board Representation**

Some staff may be required to represent the institution in a senior capacity on boards or similar activities.

This is another case where the budget should be separated. An example of this in advancement services would be participation on a software product advisory group – a more directly related activity to learning about the software.

In some cases, depending on the activity, the individual might be expected to contribute personally to some of the costs. i.e. Serving on an non-profit board where the board is not related directly to the business of the institution. It gives you valuable experience but the institution may or may not wish to reimburse for expenses related to serving.

### **New Software or Other Products Conference**

These often require attendance by multiple staff since it involves the acquisition of new technology and group knowledge needs to be improved quickly.

These conferences should really be included in a conversion or software acquisition budget as opposed to coming from a professional development pool or budget.



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### **Cost Effective Alternatives**

Professional development is not just conference attendance. There are numerous alternatives that can be utilized to improve your skill set and move your career forward.

Creativity can go a long way in finding them.

- Free seminars put on by industry associations. Can be economical and costs are usually covered by an annual membership fee or a meeting cost.
- Bring in speakers that are peers in similar local organizations. Many will do this at no cost other than out of pocket expenses.

Do the same yourself. Improves your skills, promotes your institution and can even lead to future consulting opportunities. Good for improving your negotiation and organizing skills.

- Create your own industry, user or experts groups. APRA does this very well with their local chapter organizations which are all volunteer managed.
- Bring in speakers from vendors. For example, have a security firm do a security seminar. These are valuable marketing opportunities for companies and many will do this at for none or a minimal charge.
- If you're using a consultant, especially if you have them on a retainer, have them present to staff on some aspect of what your organization is currently doing.
- Look for less expensive opportunities such as webinars or other technologically enabled forums.
- Be a conference volunteer. Can usually get you admitted for a reduced cost. Good opportunities for networking.
- Write for publications and web sites. Good professional development and helps you think more concisely about your own organization and how to make improvements.
- Join or participate in an industry experts group or panels.
- Share your expertise on a listserv and other electronic forums to network with your peers.
- Start your own newsletter, web site or blog related to your area of expertise. Good for networking and also a good resume builder.
- Host a major conference at your own institution. Good events management experience. Also allows you and your staff to attend at a minimal cost. Raises the profile of your institution and your programs.

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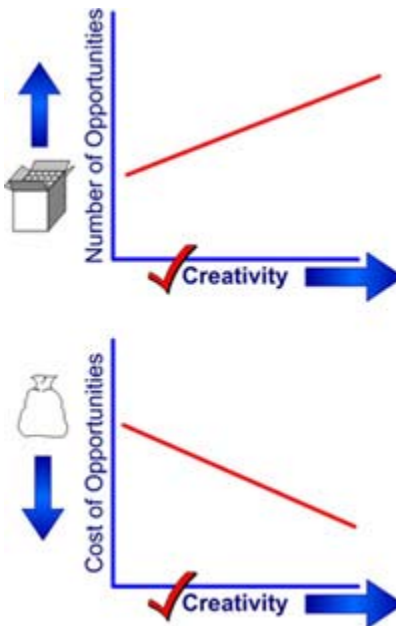
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- When attending a conference, arrange for visits with peer institutions. Since you're already there, this can be done at minimal cost. Good activity to do the day before returning home or in the afternoon after the conference ends.
- Share the registration fee with someone else if a number of the sessions are not applicable.
- Visit peer institutions. Some institutions have accommodation through a faculty club or on campus hotel at significantly reduced rates.
- Host or lead a roundtable or panel discussion.
- Get similar groups together at your institution to discuss common issues. i.e. A group of technical staff on campus that have job responsibilities for mass emailing.
- During staff retreats, incorporate an element of professional development into the agenda. i.e. A guest speaker.
- Dovetail with your job. If you're a fundraiser, schedule a few prospect calls around your conference.
- If you have multiple staff attending a conference, think about scheduling a group alumni dinner or a similar activity.
- For technical training, see if your vendor offers continuous training certificates where you can take a number of courses for less than what it would cost for individual ones.
- Look at the costs/benefits of paying for certification for your staff. Good if it appears that they will stay after becoming certified. You need to provide a career path as they gain skills. Good motivational tool.
- Training opportunities provided by your central campus. Institutions often offer a wide variety of in-house training activities, free lectures and tuition benefits.
- Seek experts on campus to come in and do a talk to on specific program areas. i.e. Someone from the business school to speak about investment vehicles to your planned giving staff.
- For systems training, try and dovetail with any training the central IT staff is taking. There may be a discount available as part a larger group that you can take advantage of.
- Product demonstrations by vendors. Although sales focused, can help to provide valuable insight and information on new products and strategies. i.e. Evaluating a software package may give you some new ideas for reports.
- Participation on institutional committees can be useful but be wary of the time they consume.

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- Seek opportunities outside your program area. If you're in the annual fund, and one of your responsibilities is running reports, take a database course.
- When purchasing software, negotiate at the onset for free training credits, or free attendance at a user group meeting for a number of staff. Also, if you become experts quickly and don't use your training credits, negotiate with the vendor to convert these to free user group attendance. You have the most leverage with your vendor during the sales negotiation process.
- The United Way has a loan rep program that allows you to gain valuable organizational, volunteer management and volunteer training skills.
- Volunteer to work at your donor events. Helps you learn the names of people you see in reports, and who some of the movers and shakers in the institution are.
- Some organizations offer scholarships to allow individuals to go to a conference if their organization does not have an adequate budget to send them.



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### **Your Share of the PD Pie**

Whenever you're asking for resources, manage up.

- Present the clearest and most comprehensive picture possible when requesting a professional development opportunity.
- Make sure you understand the budgeting process in your organization. If professional development comes from soft money, find out how to access the pool.
- A list of benefits for the institution and for yourself. How the activity enhances your own skill set and how it fits in with your overall professional development plan.
- A plan for how you will transfer the knowledge learned to other employees.
- How you feel you will participate and represent your institution at the conference. Best if you volunteer to speak, moderate a session, chair a panel, lead a round table or similar activities.
- If appropriate, what will be the risks of not attending?
- A careful compilation of all the costs for attending the conference. Hint: Use the word investment instead of cost or expense when requesting a budget.
- Lobby often for additional funds for staff that report to you. An increase in their skills makes you more effective in your own job. Also a very good motivational tool for lower and mid-level staff.
- Get comparative information on what peer institutions provide for their staff.
- Whenever you're requesting an investment, it's a good strategy to have an alternative in case your proposal is not accepted.
- If it's a delicate ask, present like you would present a proposal. Covering memo, attached conference agenda with the most useful sessions highlighted and an attached budget. Gives your manager time to think about it, and extra supporting evidence makes it harder to say no.

More budget typically available at the onset of a campaign, or a systems conversion project. Try and establish ongoing line items for these activities when budgets are available so they become a regular line item in the budget process.

By planning and managing effectively, and taking a creative approach, you can greatly enhance your skills and provide a motivating environment for yourself and your staff.

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**Professional Development Plan Goal Setting**

Many people take advantage of opportunities as they arise, and good opportunists are those that are always ready to seize any opportunity. Developing a plan with goals helps us to think about what opportunities we need in advance, so that we continually have a heightened awareness when they are exposed to us.

*“SWOT Analysis is a [strategic planning](#) method used to evaluate the **Strengths, Weaknesses, Opportunities, and Threats** involved in a [project](#) or in a [business](#) venture. It involves specifying the objective of the business venture or project and identifying the internal and external factors that are favorable and unfavorable to achieving that objective. The technique is credited to [Albert Humphrey](#), who led a convention at [Stanford University](#) in the 1960s and 1970s using data from [Fortune 500](#) companies.”* Wikipedia

**Goal: Be Promoted to Director of Development/Advancement Services.**

	Helpful	Harmful
Internal Origin	<p>Strengths</p> <p>Good technology skills.</p>	<p>Weaknesses</p> <p>No Tax knowledge.</p>
External Origin	<p>Opportunities</p> <p>Free online tax courses.</p>	<p>Threats</p> <p>New Accountant being hired.</p>



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**Your SWOT Template**

Goal: \_\_\_\_\_

	Helpful	Harmful
Internal Origin	Strengths	Weaknesses
External Origin	Opportunities	Threats



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**Your Top Three Professional Development Goals:**

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_