



# UNC System Advancement Symposium

## Navigating Leadership Transitions Among Lean Teams

May 21, 2025



## About Us

### Our Principles

#### Enlist

We identify and connect leadership.

#### Empower

We partner to build sustainability.

#### Embolden

We encourage talent and leadership.

#### Embrace

We transform lives through relational philanthropy.

Since 1984, CapDev has been making nonprofits better through inclusive philanthropy consulting and search services.

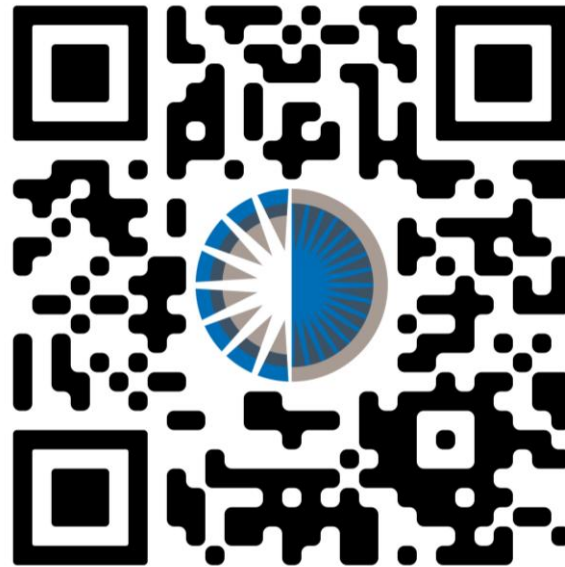
### Our Mission

CapDev partners with nonprofit communities to enlist, empower, and embolden its leaders to embrace the transformational power of inclusive philanthropy.



*Celebrating 40 Years*

Download today's slides:



# Today's Agenda

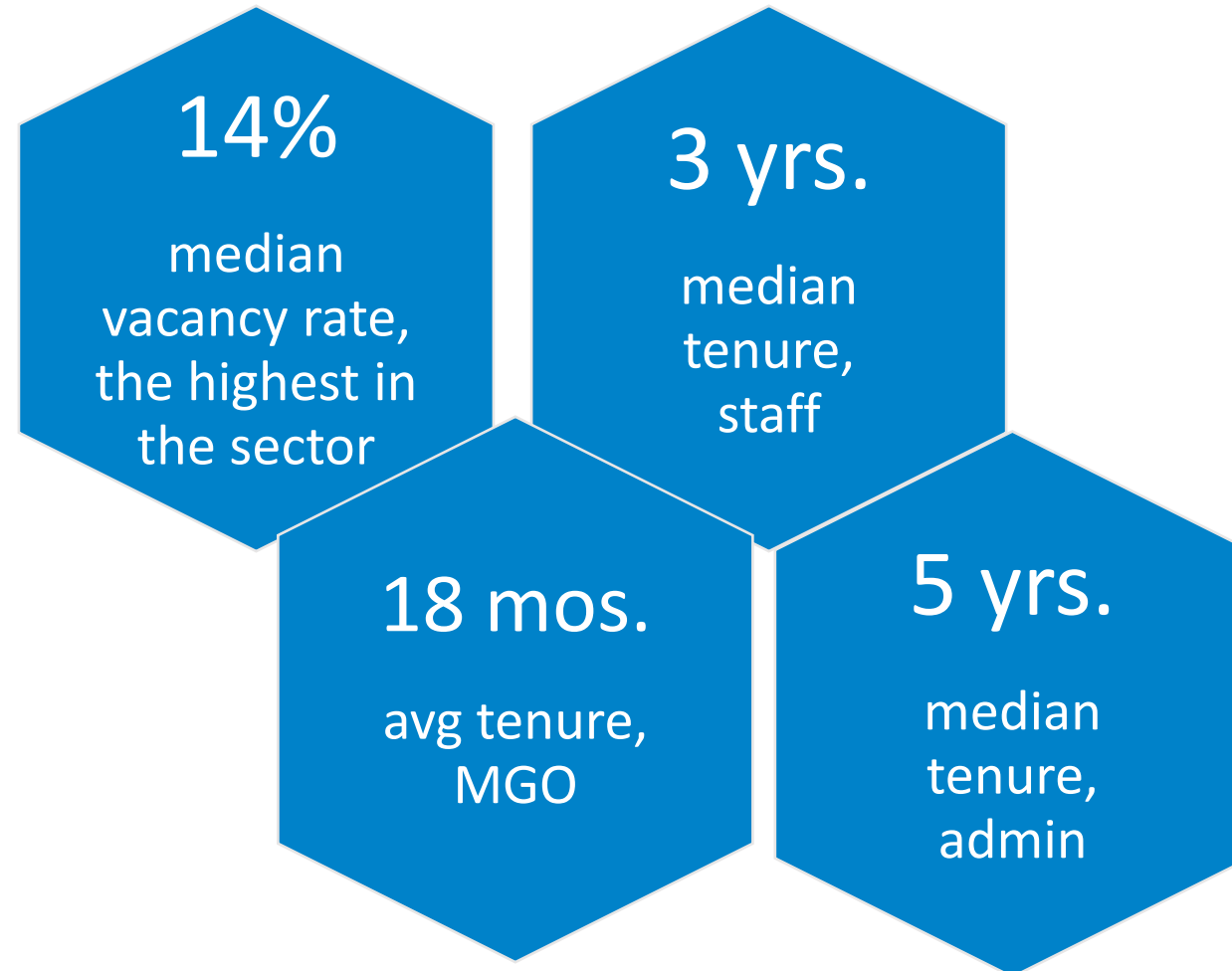




# Awareness: Trends in Higher Ed Advancement Teams



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Sources:

[EAB](#)

[CUPA-HR](#)

[CASE](#)





# Awareness: Trends in Higher Ed Advancement Teams

75%

reported having **current vacancies** in their advancement office

54%

ranked **staffing shortages** as one of the top three current challenges

57%

ranked **hiring & retaining** productive team members #1 or #2 priority in next 12 months

VPs

less likely to select staffing shortages as a top challenge than were **AVPs & Directors**.

Source:

[EAB 2025 Advancement Leaders Playbook](#)





# Attraction: Cultivating an Irresistible Workplace



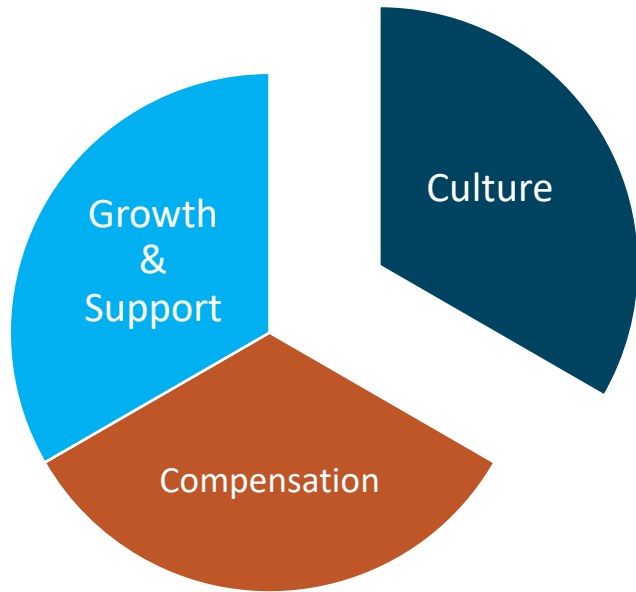
# Attraction: Cultivating an Irresistible Workplace

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Why do people choose to **JOIN** your institution?  
Why do people choose to **STAY** with your institution?



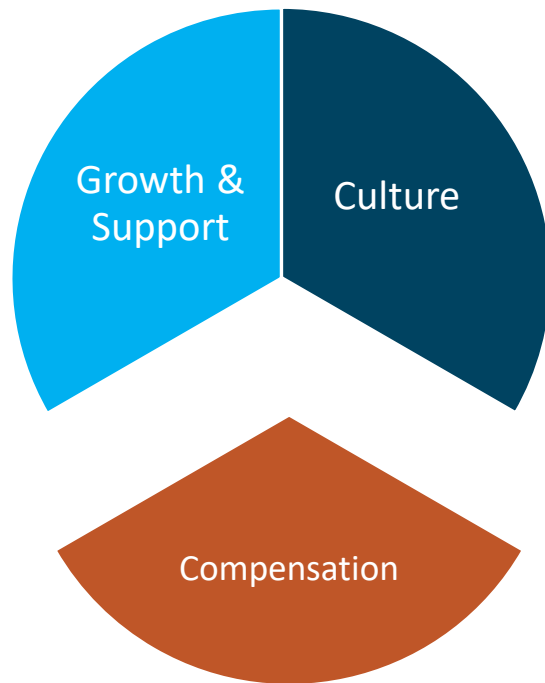
# Attraction: Cultivating an Irresistible Workplace



- Values
- Leadership
- Communication
- Recognition
- Engagement & Impact



# Attraction: Cultivating an Irresistible Workplace



- Competitive Salary? How do you know?
- How do you complement compensation with benefits?

“Across higher ed, employees are still being paid less [in 2023-2024] than they were in 2019-20 (pre-pandemic) in inflation-adjusted dollars.”

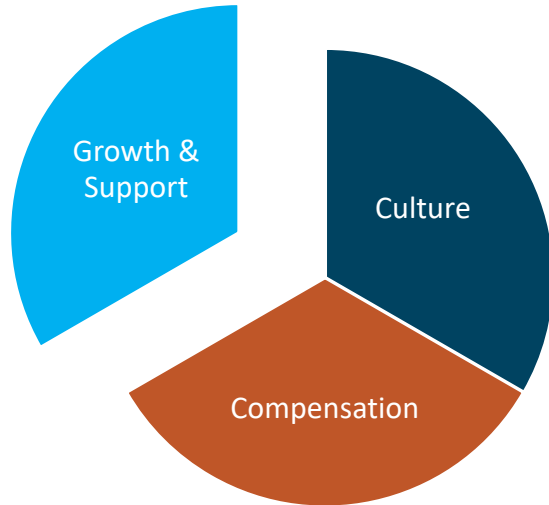
Source: [CUPA-HR](#)

“For the second year in a row, remote/hybrid flexibility is the top reason employees stay in their jobs—78% in 2025, 82% in 2024...nonprofits have an opportunity: if higher pay isn’t feasible, flexibility is a powerful retention tool.”

Source: [Social Impact Retention Project 2025](#)



# Attraction: Cultivating an Irresistible Workplace



- Professional development
- Cross-training
- Mentorship
- STAY INTERVIEWS: Rockstar or Superstar?

The top reason why employees leave is **CAREER GROWTH**.  
Source: Work Institute



# Adaptation: Innovate and Integrate



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Lean Teams Are More Agile. Could you....?

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Leverage AI

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Increase Hybrid Work Flexibility

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Contract Out Support Work

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Cross-Train

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Other Ideas





# Adaptation: Innovate and Integrate

## Advancement Team Integration

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Center Impact

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Meet Regularly

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Cross-Collaborate

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Create Buy-In Beyond Advancement

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Live in Beta Mode

### Sources

<https://www.case.org/resources/schools-toolkit-integrating-your-schools-advancement-office>

<https://www.case.org/resources/how-integrated-advancement-team-leads-success>



# Adaptation: Innovate and Integrate

## External Transition Plan

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Identify stakeholders to be informed

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Invite exiting staff member to personally communicate transition to donors

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Reassign relationship and document reassignment ASAP

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Ask exiting staff member to facilitate relationship transfer

### PR considerations

The goal is to have as little disruption to the donor's relationship to the institution as possible

Involve the exiting staff member to participate in the transition plan- you want to have a “happy leaver”



# Adaptation: Innovate and Integrate

## Internal Transition Plan

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Identify responsibilities (daily, monthly, non-recurring, etc.)

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Identify pending projects

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Identify upcoming deadlines

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Key contacts and information

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Internal communication about transition

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EXIT INTERVIEW

### **Work with the exiting staff member to collect:**

- Brief description of each project/donor profile
- Additional information to be entered in CRM
- Other relevant parties involved?
- Links to related files/documents
- Status

### **Determine:**

- Continue or pause?
- Reassigned to?

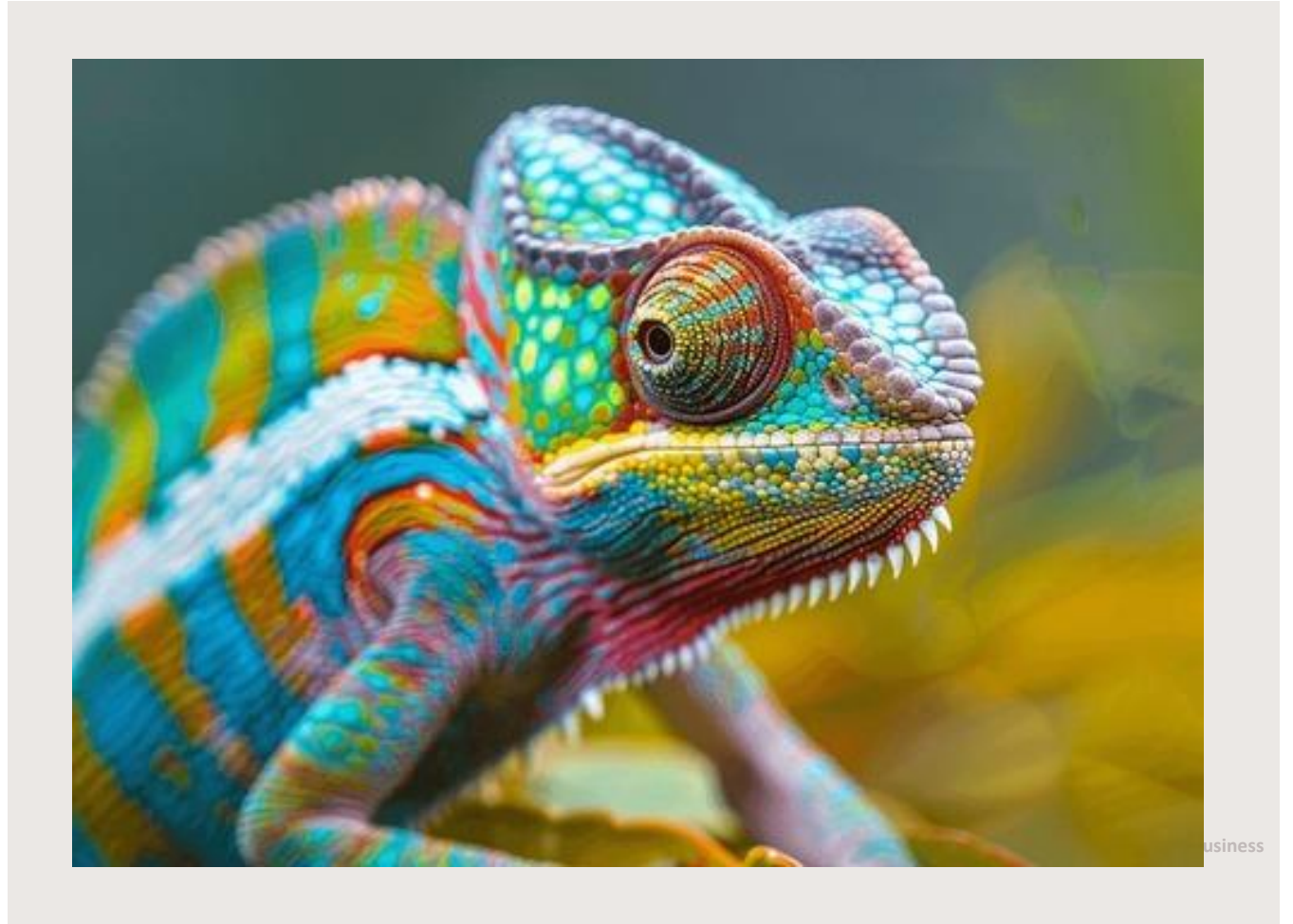


# Learn With CapDev

**TOMORROW, 12PM**

Compass Report 2024 Deep  
Dive #2 Webinar:

Educate and Empower the  
Future Nonprofit Workforce





## Other Ways CapDev Partners with You

- Executive Search
- Candidate Sourcing
- Succession Planning
- Onboarding





# Q & A





Thank You

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