A Study of Chief Development Officers in Theological Education

By David Heetland

In late 2019 The Association of Theological Schools in the United States and Canada (ATS) launched a study of six leadership education groups—presidents, deans, chief financial officers, chief development officers, student life personnel, and technology officers—to better understand the state of each role in theological education. With a better understanding of each role, ATS hoped to identify needs that could be addressed with an updated curriculum for leadership education.

A research team was recruited to do an in-depth study of chief development officers. David Wang was the researcher for the quantitative phase of the study. He is on the faculty at Biola University (Talbot School of Theology is the ATS school associated with Biola) and serves on ATS' Research Advisory Committee. Meryl Herr was the researcher for the qualitative phase of the study. She is the founder of More Good Works, an organization that does research and planning in higher education, and is an adjunct faculty member at Trinity Evangelical Divinity School. I was invited to be the role advisor, having been the chief development officer at Garrett-Evangelical Theological Seminary for 35 years and now serving there as senior vice president for planned giving. Debbie Gin, director of research and faculty development at ATS, recruited this team and coordinated our work together.

The quantitative phase of the study consisted of analyzing the data from 89 respondents to an online survey that was sent in November 2019 to all development officers of ATS member schools. It was decided to send the survey to all development officers since less than half (48%) of ATS member schools have a chief development officer. Of those who responded, 62% were chief development officers and 38% were development officers. Slightly more females (51%) responded than males (49%). Respondents represented mainline Protestant schools (53%), Evangelical schools (35%), and Roman Catholic schools (12%). (See Appendix for representative quality of the interview set.)

The qualitative phase of the study consisted of in-depth Zoom interviews, lasting approximately one hour each, with 20 chief development officers. Ten interviewees were female and ten were male. Ten were from mainline Protestant schools, seven were from Evangelical schools, and three were from Roman Catholic schools. Sixteen identified as Caucasian and four identified as Black. Eighteen served at schools in the United States and two served at schools in Canada. Fourteen of the interviewees served at stand-alone schools and six served at schools embedded in another institution.

The purpose of this report is to synthesize the findings from these two phases to help ATS better understand the role of the chief development officer today and how the profession has changed. With this information, ATS will be better prepared to

predict the kind of effective leadership needed for the future and to identify the needs that should be addressed in an updated curriculum for leadership education. The quantitative and qualitative phases of this study sought to answer twelve key questions. These questions form the basis for this report.

How has the role of chief development officer changed?
In one sense, the role of chief development officer is the same as it always has been: the purpose is to raise the necessary funds to help the school fulfill its mission. A number of chief development officers noted, however, that their work has changed, and continues to evolve, in response to both internal and external factors.

An institutional leadership transition is an internal factor that can significantly influence how development work is done. Many of those interviewed have weathered a change of leadership at the top. They commented that a new president (or dean, if in an embedded school) often means a change in the organizational structure, the makeup of the leadership team, and the school's fundraising goals—all of which can change the chief development officer's responsibilities.

The financial constraints facing many theological schools today are another internal factor that can influence how chief development officers do their work. As enrollments continue to decline, many seminary presidents and chief financial officers expect the development office to raise more dollars to balance the budget. At the same time, chief development officers may be expected to reduce development staff because of budget constraints, thus being asked to "do more with less."

A third internal factor affecting the role of chief development officer is staff turnover. A number of those interviewed have seen substantial staff turnover. One lamented his inability to offer competitive compensation to his staff and therefore his struggle to retain good staff. While some saw staff turnover as an opportunity to rebuild their teams, others recognized that the time, effort, and expense in hiring and training new staff detracted from their primary responsibility to raise the necessary dollars for their schools.

And finally, some chief development officers noted that their role changed because of a shift in fundraising focus within the school. Some said their schools wanted to focus more on major gifts and planned gifts and less on annual fund giving. Others said their schools wanted a greater focus on raising unrestricted annual fund gifts in order to balance the current budget.

In addition to these internal factors, chief development officers also noted that their roles change as they respond to external factors. The three primary external factors they noted were changing trends in philanthropy, a changing donor pool, and changing denominational support. To that list I would add a changing world situation. Let's look briefly at each:

Chief development officers agree that philanthropy is changing. Technology continues to shape and reshape how they do everything from communicating with donors (emails and texting and social media and websites are supplementing or replacing phone calls and direct mail) to raising funds (online giving and crowdfunding were unknown just a few years ago). New tax laws also impact how and when donors make their gifts.

Closely linked to the changing trends in philanthropy is the changing donor pool. Many chief development officers noted that their major donors are aging and dying. The next generation of donors does not necessarily share the same values or the same loyalty to established institutions. Nor are they as likely to make unrestricted gifts to an organization. Thus, in addition to a shifting demographic within the donor pool, a number of chief development officers have watched their donor pool shrink in size.

Changing denominational support is another external factor that is shaping the chief development officer's role. Many theological schools have depended heavily on churches and individuals within those churches for financial support. As church attendance decreases, particularly in mainline and Catholic congregations, so does the number of potential donors for theological schools. While decreasing church attendance isn't as clear in the evangelical context, they also face the challenge of an adequate donor base. This suggests that development officers are going to need to find new ways to expand their donor base if they are going to meet their fundraising goals.

The fourth external factor that needs to be considered is one that was unknown when this study began. The coronavirus pandemic has dramatically changed the world—and how development officers do their work. In a profession that depends heavily on travel, face-to-face contact, and building relationships, how does one accomplish these goals when travel is not permitted and development officers are forced to work from home? Development officers are finding new ways to stay in touch with their donors and maintain strong relationships. It is too early to know how this pandemic will permanently affect the chief development officer's role, though it is bound to have a significant impact. Ways we engage donors out of necessity may become new effective ways to engage them when the crisis is over.

Even with all of these internal and external factors forcing chief development officers to adapt their roles and work differently, those interviewed insisted that the core of their work will remain the same: to share the exciting mission of their school and invite others to become their partners in fulfilling that mission through their prayers, their gifts, and their service.

What are the pathways to the role of chief development officer?

"No one says, 'I want to be a chief development officer when I grow up!'" Several chief development officers offered some version of that statement when describing how they came to their present position. Thus, it is not surprising that those who

end up in development come from diverse backgrounds. When those responding to the online survey were asked to identify all the sectors where they had previously worked, the largest number (54%) had worked in the nonprofit sector, followed by business (45%), congregational ministry (34%), and non-theological higher education (30%).

So, how did they end up in development? The majority (45%) said "I did not apply but was invited to take the position." Another significant number (27%) said "I was asked to apply and went through the application process." And then there were those (20%) who said, "I knew the position was for me and applied."

When asked what were the main reasons that they were able to attain their current role, survey participants suggested it was their effectiveness in prior leadership roles, their growth and development of skills, and their education. A significant number (74%) also indicated they had a mentor who influenced them professionally.

Most interview participants suggested that anyone with the right personality and soft skills could learn to be a development officer. They can learn development from books, experienced development officers, credentialing programs, or on the job. The successful development officer will have good relationship building skills, a passion for the organization's mission, and the ability to communicate well and invite others to become partners in that mission.

What is the nature of the work of a chief development officer?
The chief development officer's work is multifaceted: administrator, fundraiser, institutional leader, department leader, meeting attender, story teller.

Several chief development officers divided their role into two primary functions: administrator and fundraiser. "Those two categories, administrator and fundraiser, capture the essence of the chief development officer's work," noted one interviewee. Another similarly described his work as "half-time VP and half-time gift officer."

These two roles are sometimes in tension with one another. One interviewee said her boss once told her, "You are a unique chief development officer because either a chief development officer is a fantastic manager or an administrator or a chief development officer is a fantastic fundraiser. Usually they're not both." Another interviewee captured the tension between these two roles very well when he stated, "I often think chief development officers can get caught up in the administration side. . . we like to busy ourselves so that we don't have to go do the hardest and most important thing, which is go talk to people and ask them for money. To me, that's what a chief development officer needs to do."

And it is very easy for chief development officers to busy themselves in endless meetings—with development staff, leadership team members, staff in other departments, faculty, and students. Many of these meetings are necessary and

important—to build a cohesive and well-functioning development team, to participate in strategic planning with other leadership team members, to develop relationships with staff in other departments, faculty, and students. When they connect with staff, faculty, and students, they learn what is going on within the institution and can then share those stories with donors.

Many chief development officers agreed, however, that the most important meetings take place off campus, where they seek to develop meaningful relationships with alums, trustees, and friends. One interviewee put it well when he said, "You're the chief storyteller. You're the one that's taking what's happening with our students, with our faculty, with our staff, and you're articulating that to your constituency. You have to be plugged into literally everything that's going on."

Another interviewee also focused on the storyteller role when he noted that "people aren't going to give because they feel obligated to give . . . . We need to have a compelling vision, and we need to be passionate about that vision such that it's infectious to people," and can eventually lead to a gift.

This is the challenge for chief development officers—to be plugged into everything that's going on at the school so that they can internalize the vision, the strategic plans, and the compelling stories of faculty and students, while at the same time spending the majority of time out in the field, building long-term relationships with donors and passionately sharing that vision and those stories.

Finding that appropriate balance between on-campus activity and off-campus meetings with donors and prospective donors is a never-ending challenge that many chief development officers struggle with on a daily basis. When development officers were asked at the 2020 DIAP (Development & Institutional Advancement Program) conference to identify the most pressing concern in their role, several identified time management. One participant noted. "It is all important! How does one prioritize and strategize with limited hours in a day?"

A number do that by putting in long hours each week. Survey respondents indicated that they worked an average of 46 hours a week, with a range between 30 and 70 hours per week, and several interviewees suggested they struggle with an appropriate work/life balance. This issue will be explored later in the report.

What is the relationship of the chief development officer role to other roles in the institution?

Chief development officers at stand-alone institutions described working most closely with the president, the board, and the chief financial officer. Most chief development officers at these institutions report directly to the president and are a part of the leadership team or president's cabinet.

They work very closely with the president in setting fundraising goals that grow out of the strategic plan. Several noted that the president is the actual chief

development officer, and their task is to help the president be successful in this area. Most chief development officers have excellent relationships with their presidents and enjoy working with them to meet the fundraising goals of the school.

Chief development officers also work closely with the board of trustees, preparing regular reports to the board about development work and helping board members understand the important role they play in fundraising.

Finally, chief development officers work closely with the chief financial officer. This relationship is sometimes contentious because, as one interviewee noted, they have different priorities. "I'm raising the money, and then he decides how to spend it" is how one interviewee described the built-in tension. Another suggested that development and finance offices get "in wars over the years in most institutions, because we're trying to bring new and they want same-old and want steady, unrestricted gifts. That's just not realistic in today's culture." And I've often heard chief development officers say that chief financial officers just don't understand that it takes money to raise money.

However, most of the participants interviewed seem to have good relationships with their chief financial officers and meet with them regularly. It helps if chief development officers understand finance and how to read budgets so they can speak a common language.

Other roles that chief development officers interact with, though perhaps not as frequently, are the academic dean, the communications/marketing person, the financial aid officer, and the admissions officer.

Chief development officers working in embedded schools may have a different reporting relationship. They may report to a vice president for advancement at the larger university, with a "dotted line" reporting relationship to the senior administrator of the theological school. These persons may be less involved in strategic planning than their colleagues in stand-alone institutions and may collaborate more with development officers responsible for fundraising in other areas of the university.

What recruitment/retention models are most effective?

When survey respondents were asked which development positions were difficult to fill, the only position they indicated was "difficult" to fill was field staff. They noted that other development positions (director of development, director of alumni/ae relations, director of annual giving, gift processor) were "somewhat difficult" to fill. This will not be a surprise to many, because it takes a special person who is goal oriented and thrives on being on the road a majority of the time, meeting new people and inviting their support.

Likewise, survey respondents indicated that retaining field staff was more difficult than retaining other positions. There are probably two reasons for this. First, a

number of persons discover rather quickly that this is hard work and they would prefer to do something else. Or second, they are good at what they do and have opportunities to move onward and upward.

So what recruitment/retention models are most effective? Seek to recruit persons who are self-motivated, goal oriented, and passionate about your school's mission. Then reward their good work with a competitive salary and/or other perks that motivate them to remain at your school.

What predicts longevity in the role? What predicts satisfaction in the role? Because interview participants' responses to questions about longevity and satisfaction overlapped so much, these two questions are considered together. What are the negative factors that contribute to dissatisfaction and lack of longevity, and what are the positive factors that contribute to longevity?

First, it should be noted that chief development officers do not have a good track record in terms of longevity. One interviewee cited the statistic, from a national study on nonprofit chief development officer retention, that chief development officers stay in their role an average of 18 months. Another shared that she was the fourth chief development officer in six years at her school.

A number of factors contribute to job dissatisfaction and short tenures: having to meet unrealistic expectations, having a poor supervisor, a lack of organizational health, feeling undervalued.

Another factor that needs to be given serious consideration is burnout. One participant noted that "there are days when it is hard to find time to eat my lunch. The pace is pretty stiff and diverse. Stress and joy, those are the two emotions I feel the most."

Another experienced development professional shared, "You can end up being out every single evening, you can end up working seven days a week. I can't remember when I had a whole weekend off, because it's working all the time."

Indeed, for many chief development officers the work simply feels unrelenting, as there is always more to do. One described the feeling well with these words: "You have to run as fast as you can for 365 days, breathe in, breathe out, and then start all over again and run as fast as you can. That takes a certain amount of energy that not everybody can sustain for an endless amount of time."

Two interviewees shared sobering stories of their own burnout. One attributed his burnout to his myriad professional responsibilities as well as a president who did not seem to care. Another spoke of working excessively long hours, which landed him in the hospital several times and ultimately led to his wife leaving him. "I experienced major burnout," he said, "that impacted every aspect of my life."

Thus, it is probably not surprising that the two greatest causes of work-related stress for chief development officers are balancing demanding work hours with other responsibilities (43%) and dealing with difficult employees and colleagues (43%).

Other strong, and statistically significant, predictors of chief development officers beginning to look for another job include:

a. An inability to help the school find its way to a sustainable business model
b. Poor listening skills
c. Embodying a leadership style that values transparency and a lack of freedom to be transparent within their institution
d. Stress from dealing with difficult board members
e. Embodying a leadership style that sees oneself as a change agent but encountering difficulty actually producing such change, perhaps due to resistance or other challenges
f. Embodying a leadership style that is imaginative, which is perhaps not fully utilized or appreciated in one's current position

The good news is that the vast majority of chief development officers are either satisfied (45%) or very satisfied (37%) with their current job, and the majority (65%) do not intend to leave their current position in the near future. So, what predicts satisfaction in the role?

Not surprisingly, the work they do brings satisfaction to chief development officers. There is a sense of accomplishment in meeting challenging goals and in helping the school fulfill its mission. There is satisfaction in building strong relationships with coworkers and alums and friends of the school. One interviewee summarized the feelings of many when he said, "I absolutely love the work that I do. I love the institution that I work for." Several described it as a sense of calling to the role.

Being given leadership opportunities also helps chief development officers feel satisfied in their roles. They appreciate being given the freedom to do their work without someone micromanaging them. Receiving acknowledgement for their accomplishments also contributes to their sense of satisfaction.

Chief development officers also want opportunities for growth and advancement within their role. Personal and professional growth opportunities contribute to their satisfaction as well. So does adequate compensation and feeling cared for by the institution. Finally, and perhaps most importantly, chief development officers feel satisfied when they feel successful.

Being satisfied in one's current role does not mean that a chief development officer will stay there indefinitely, however. While some look forward to retiring in their current position (63% of survey respondents), others are open to new possibilities. One interviewee expressed an interest in finding a better work/life balance, perhaps

through a business opportunity "where I could work less during the week and be a more present father."

Others aspire to greater leadership responsibility, including the possibility of being the president of a seminary or university. One relatively young chief development officer expressed this openness to new possibilities well when he said, "I've been asked about the presidency at the institution I'm at. I always say I'd like to be the kind of person who *could* be a president without the expectation that I *should* be a president. The mission is way more important than I am. The right person at the right time for the right institution is what is most important. I'm not like. 'president or die' here or anywhere. I'm not opposed to it either."

What predicts effectiveness in the role of chief development officer?
Survey participants were asked to identify the three qualities that best described their leadership style. The top three qualities were collaborative (48%), servant leader (38%), and organizational thinker (37%), followed closely by team builder (34%).

Those interviewed were also asked what skills and training were needed to be effective, and how a chief development officer should be evaluated. According to participants, an effective chief development officer must have strong relational, communication, and leadership skills.

Regarding relational skills, one participant noted, "I think you have to have really good interpersonal skills, including being able to listen well."

In addition to strong relational skills, chief development officers need good communication skills for their role as chief storyteller. Another participant noted, "You need to be able to write and speak clearly. It helps to be a storyteller because that is what you're doing. You're telling the story of the work of the students and all those things. You need to be somebody who is connected, understanding all the different things that are at play within the organization, so that you can articulate those things."

Chief development officers also need strong leadership skills. They build and lead the development team, and they help lead the institution by serving on the president's leadership team. Many also play a leadership role in the strategic planning process.

Survey results revealed that 34% of respondents had a degree in theological education. Interview participants were asked how important they felt a theological degree was for their work. Most indicated that a theological degree, while potentially very helpful, was not necessary for the chief development officer to be effective. What was essential, however, was to know both the church and higher education very well. One participant put it well when he said, "These are two

institutions that are very unique, and they're drawn together in a seminary, which makes it a complicated ship to sail."

There were some, however, who felt that a theological degree is necessary to do development work within theological higher education. One participant suggested that if a chief development officer did not have such a degree "they absolutely have to be on a fast track for gaining a theological framework . . . probably do a certificate or something like that in theology or biblical studies."

Whether or not one has a theological degree, nearly everyone agreed that chief development officers should be persons of faith. A few participants indicated that successful chief development officers also needed to have a biblical framework for fundraising.

Several chief development officers described how their personal faith enabled them to connect with donors. One participant noted, "Understanding the language of the church and being able to talk with donors about faith is just really important." Another suggested, "Knowing the faith through practicing it gives chief development officers and donors a shared vision and a shared language through which to talk about giving."

In addition to being persons of faith, chief development officers should know the faith tradition of their school very well. Sometimes this intimate knowledge comes from being a graduate of the institution. Other times this knowledge comes from sitting in on classes, meeting with students, and getting to know faculty. No matter how it is gained, chief development officers need to know their institution very well in order to tell its stories and inspire donors to support its mission.

At least one chief development officer takes very seriously the goal of knowing intimately the school he represents. He earned a theological degree while working there, and still attends classes for the ultimate purpose of connecting with donors. He explains, "I'm to the point where I'm actually going back and retaking classes, just so I can connect with another generation of students who will be alumni at some point. Maybe they will recommend people from their congregation to come to our seminary, or maybe they'll introduce me to somebody in their church who has means and can help us with our projects."

How should one measure the effectiveness of chief development officers? All agreed that chief development officers should be evaluated based on certain metrics. Not everyone agreed on what those metrics should be however.

Some participants were adamant that money raised should be the primary criterion by which a chief development officer's success is evaluated—and most boards and presidents would probably agree. One participant suggested that chief development officers be evaluated by comparing money raised to expenditures. Another suggested that the fundraising standard should be "how much money are you

raising in proportion to how many people you have, and what does it cost you to raise a dollar?"

Several participants suggested that if chief development officers are to be evaluated on dollars raised, it should be over an extended period of time. One person noted that evaluating chief development officers based on money raised in their first year on the job is undoubtedly connected to the short tenure many chief development officers have in their roles. "I think the number one problem is that institutions are holding chief development officers to numbers in the first year. That's not realistic, in my mind."

Another participant agreed that the evaluation period needed to be longer than a year because a person could have had a bad year or could be "making up ground from a predecessor." And a third person suggested a three-year span, citing trends that could affect a person's metrics from year to year. She said, "Just because you have one bad year doesn't necessarily mean that you're a bad fundraiser."

Surprisingly, many chief development officers believed that money raised should not be the primary criterion for success. One younger chief development officer said, "I'd say it's more important how the relationships are built. The dollars are a lagging indicator."

Another seasoned chief development officer agreed that effectiveness should be tied to relationships. "I would define success as actually growing the potential of the donor base." He went on to emphasize the importance of establishing relationships in such a way that they are sustainable for the institution and not just for an individual.

How do you measure relationship quality? Some participants suggested that if relationship quality needed to be quantified, number of visits made, or number of connections, or number of conversations, or number of moves could be better indicators of success than dollars raised.

Some chief development officers suggested that since they lead their team and help lead the institution, their leadership should be evaluated. Others suggested that their ability to communicate the school's message to potential donors should be evaluated.

Ultimately the effectiveness of chief development officers will be judged by all of these metrics. Therefore, perhaps the best and simplest way to determine their effectiveness is to evaluate their results in each of these areas based on previously established goals.

How is good leadership developed?

In addition to leading their development departments, many chief development officers also serve on the leadership team for their institution, a role they find to be

enjoyable, productive, and effective. Most interviewees said they join with other leadership team members to develop the strategic plan as well as fundraising goals necessary to help make the plan a reality.

Healthy leadership teams are characterized by trust, inclusive leadership, and collegiality. Many chief development officers described experiencing a relatively high level of trust on their leadership teams. Some, however, indicated that trust had been compromised by an insider-outside dynamic on the team.

For many, the trust they experience on their leadership team develops as they work with competent individuals on a team governed by inclusive leadership. Numerous times they described their leadership teams as a place where everyone has a voice. One chief development office described how his president sets the tone for such inclusive leadership. "He allows everybody to be able to give input, which is really important, about what they think should be done. Then we narrow it down about which solution is probably the best for that particular problem or issue."

Several of those interviewed described how they experience a deep sense of collegiality with other leadership team members, which extends beyond the workplace. That kind of collegiality contributes to the trust they have in each other.

Besides being a leader of the development team and a member of the leadership team, several indicated they had effectively led their institution through significant change. In many instances, chief development officers have brought stability in the midst of institutional change. One chief development officer described bringing stability by being the keeper of corporate memory in the midst of numerous presidential transitions. Three others described how they brought a sense of stability to donors who were reluctant to give during the instability and uncertainty of a leadership transition. In each of these instances, the chief development officer provided stability by being the institution's chief storyteller.

While it is clear that chief development officers are effective leaders in several roles, a number confessed that their schools are not particularly effective in developing future leaders. "Because we're a small seminary, we don't have that many avenues for promotion and moving up," noted one chief development officer. In addition to being limited in terms of opportunities for promotion, a number of schools struggle to entice staff to stay because they cannot pay competitive wages compared to other organizations.

Nonetheless, several participants indicated that they wanted to grow in the area of developing future leaders. Those interested in doing so might want to follow the formal leadership development plan instituted by one school. The chief development officer described the process in these words: "Our board has required that each of us on the cabinet put together our succession plan and think about it in two ways. One is, if we get hit by the proverbial bus tomorrow, what should the institution do to cover our spot? Then long-term, does that internal talent exist?

Who would that internal talent be? How could they be developed and given more responsibility to be prepared for whatever opportunity may come next?"

If internal leadership talent does not exist, schools might be well served by looking within their faith tradition (church-related colleges, seminaries, foundations or other organizations within their denomination) for potential leadership. I think pastors who have a strong commitment to financial stewardship can become excellent development officers because they have the theological training, the pastoral skills to be good listeners, and the communication skills to articulate the school's mission with passion and integrity.

How adequate is compensation?
When survey respondents were asked this question, they responded that they were "slightly satisfied" with their compensation. It is interesting to note that the greater number of years in the role predicted more dissatisfaction concerning salary. This may suggest that those who have been in their role at an institution for some time do not feel appropriately recognized and rewarded for their work. It may also suggest that theological schools are being forced to stay competitive with the secular market today, more so than in previous generations.

What are the preparation gaps?
When asked to what degree they felt prepared to exercise leadership in 21 different areas, survey respondents indicated they felt least prepared to exercise leadership in the following areas: mediation, preparing for accreditation, self-care, change management, navigating organizational politics, facilitating uncomfortable conversations, grant writing, and conflict management.

They were then asked to identify from a similar list (except self-care was not included on the list) those areas they would be interested in participating if ATS were to offer programming and resources. Respondents expressed the most interest in the following topics: fundraising, strategic planning, change management, developing sustainable business models, grant writing, and conflict management.

It seems clear from these responses that chief development officers are most interested in improving their professional skills and engaging in professional development opportunities that apply most directly to their work. While they felt least prepared to provide leadership in mediation and preparing for accreditation, these are also two areas where they are likely to have minimal involvement, and therefore expressed less interest in professional development in these areas. They did express interest, however, in improving their leadership skills in those areas that most directly impact their work, such as change management, grant writing, and conflict management. They also expressed interest in continuing to grow and improve their fundraising skills, especially in those areas that increasingly impact their work, such as strategic planning and developing sustainable business models.

This was also confirmed in the interviews with chief development officers. They believe they have more to learn and are eager to grow and improve their professional skills. The interviews revealed four major learning areas that would interest them: 1) the art of fundraising, 2) the science of fundraising, 3) communication, and 4) leadership.

Even though most chief development officers already have the requisite soft skills to be effective, they still welcome more training in the art of fundraising. They would especially appreciate training on how to meet donors of various giving capacities, how to build relationships with them, and how to move them through the development pipeline and ultimately close a gift.

They are also interested in learning more about the science of fundraising, especially receiving more technical knowledge on certain types of gifts, such as planned gifts and major gifts. They would also welcome a better understanding of tax laws, the changing economy, writing grant proposals, and managing databases.

When it comes to communication, some would appreciate learning more about the Next Generation and how to engage them effectively. Chief development officers would also like more training in how to communicate with donors online, especially since the coronavirus pandemic has made this an important way to stay in touch with donors, at least temporarily. Some would also like more training in marketing and how to protect the institution's brand.

Finally, chief development officers want training in the areas of institutional leadership, departmental leadership, and self-leadership. In the area of institutional leadership they would welcome learning more about strategic planning and working with boards. In the area of departmental leadership they would like to learn how to build and manage a team. They also want to grow in self-leadership by learning how to balance multiple roles, how to work smarter, and how to understand the vice president role.

In short, there are many opportunities to help chief development officers grow professionally and personally and they are willing and eager learners.

How should ATS change its programming in order for it to be the "go to" resource for chief development officers?

While nearly half of survey respondents (48%) indicated they had attended a DIAP conference sponsored by ATS in the last few years, many chief development officers do not see ATS as their "go to" resource. Rather, they turn to other organizations for their professional development.

There are a number of reasons for this. There is a plethora of professional development programs offered in a variety of formats on a constant basis by a number of organizations. These include such well-known and respected organizations as CASE (Council for Advancement and Support of Education), AFP

(Association of Fundraising Professionals), and the Lilly Family School of Philanthropy at IUPUI.

In addition to these organizations providing training, so too do any number of professional development firms, such as Gonser Gerber, Stelter, Sharpe Group, PGCalc, Campbell & Company, Crescendo, and Advancement Resources.

The quality and expertise of much of this training is excellent and it is often easily accessible through regional events or one's personal computer. Indeed, the variety of formats for obtaining helpful information has exploded, and includes newsletters, reports, blogs, seminars, webinars, videos, online resources, and virtual learning.

As a result of these many offerings, the time commitment is often shorter (a one hour webinar instead of a two day conference), the cost is often cheaper (many webinars offered by development firms are either free or modest cost), the travel is minimal (either to a regional event or to one's computer), and the material is up to date (with almost daily invitations currently to attend webinars with such titles as COVID-19: Philanthropy in a Changing Landscape; Advancement During the COVID-19 Crisis; Productive Planned Giving Calls in Tough Times; and The Pandemic, the CARES Act, & Gift Planning).

It is hard for ATS to compete with all of these offerings when it only offers an annual two-day national conference with workshops led by its own members. It is not surprising that attendance at these annual events has declined in recent years in light of the competition it faces. One interviewee summarized the thoughts of many when she said, "Sometimes the ATS DIAP conference is so small that you might not get the breadth or depth of experience that you are looking for" compared to what other organizations offer in terms of professional development.
Another seasoned chief development officer shared why she didn't attend the 2020 DIAP conference. "I looked at the content briefly, and I didn't necessarily see anything that was of great interest to me. It's something where I don't have a lot of professional development dollars, and so it would have to be pretty spectacular."

Again and again those were the reasons given for not attending ATS events: Not enough funds to attend, not enough time to attend, and giving greater priority to other professional development opportunities outside of ATS.

Increasingly that priority is given to webinars. One interviewee shared, "Probably once a week I'm on somebody's webinar." Because they're often free or relatively low-cost, he and his staff can attend a webinar on any number of topics relevant to them, such as working with the board, understanding major gifts, or using Microsoft Excel. He went on to say, "I decipher what's important and what isn't. When I see something, I get my staff involved. I'll send it to the president, or I'll send it to the board members, or I'll send it to the dean. I say, 'this is something that you may want—a free webinar.' For ones that are not free, they may only cost $100. We'll get on as a team, and we'll listen to it."

However, even though there are many other opportunities for professional development, there is still a place for ATS to be involved. Several chief development officers noted that ATS fulfills a particular niche. While other organizations can teach the basics of fundraising, most do not focus on the faith dimension of fundraising. Thus, there is a special bond among chief development officers of theological institutions who recognize fundraising not just as a high and worthy calling, but as a very important ministry. They recognize that they have been given an opportunity to help strengthen their institutions *and* an opportunity to help donors grow in their own spirituality by investing themselves in something bigger than themselves.

Recognizing that fundraising for theological education brings special challenges and special opportunities, one chief development officer noted, "I think ATS really is my key go-to. It's what my peers are doing and the things that they're recommending that help guide me." Indeed, it is this peer-to-peer interaction that DIAP attendees probably appreciate most about the annual DIAP conferences. But conferences can be cost-prohibitive for many. And so the question becomes, are there other ways to foster such interaction—and learn from one another—instead of, or in addition to, the annual DIAP conference?

This is the challenge that ATS will need to address as it seeks to develop an updated curriculum for leadership education. Some ideas that surfaced in the interviews that ATS may want to consider include the following:

Provide articles on self-care strategies and model the necessity of self-care by offering time for it at conferences and/or sponsor retreats where there would be time for quiet and time for reflection and time just to grow. One chief development officer who experienced burnout himself said, "I would love for ATS to help younger chief development officers learn about self-care. I had to learn it the hard way. It almost broke me."

Sponsor periodic (Once a month? Once a quarter?) webinars on some of the specific topics identified in this study as being of interest to chief development officers. Presenters at these webinars could be ATS colleagues as well as other individuals recognized as having expertise in a particular area.

Gather together chief development officers from similar institutions to learn from one another. A number of interviewees described how helpful it was to learn from colleagues at similar institutions. One interviewee commented, "For me a productive professional orientation would be concentrating on the Catholic seminary context because it's very different."

Develop a smaller cohort model for professional development. When asked about his ideal ATS gathering, one chief development officer commented, "I think there is something really worthwhile about being together, face-to-face, but it might be small retreats rather than large conferences. It might be 10 to 15 chief development

officers in a great location who are getting to know each other and able to pick each other's brains."

Sponsor events that bring together chief development officers and other key seminary leaders. Since presidents are really the chief development officers, as several interviewees noted, it could be helpful to bring a group of chief development officers and presidents together to learn from one another. Another interesting grouping would be chief development officers and chief financial officers since they also work closely together, though sometimes are at odds with one another. Interviewees expressed an interest in learning from board members and donors as well.

Develop a mentor program where a retired chief development officer or one with many years of experience could be paired with a new chief development officer.

Help facilitate peer virtual gatherings through Zoom. The coronavirus pandemic is teaching us that, while not the same as face-to-face meetings, Zoom meetings can be an effective and inexpensive way to bring people together from around the world for conversation, worship, and learning.

Conclusion

This report seeks to synthesize the salient findings from the quantitative and qualitative studies of chief development officers conducted in late 2019 and early 2020 by David Wang and Meryl Herr under the capable leadership of Debbie Gin at ATS. I hope the report will help ATS understand the kind of leadership that will be needed for future theological education and how ATS can help prepare and support chief development officers in their roles.

Appendix

Representative Quality of Samples

Sample Size: 89 total, 55 CDOs (38% CDO response rate)

Survey Response Set	ATS/COA Database
9.0% Canada	13% Canada
34.8% EV 52.8% ML 12.4% RC/O	46% EV 35% ML 19% RC/O
24.7% Related	36% Related
10.1% Small (1-75 HC) 24.7% Mid-sized (76-150 HC) 30.3% Large (151-300 HC) 34.8% Largest (300+ HC)	15% Small 28% Mid-sized 31% Large 26% Largest
69.7% Denominational 18.0% Independent 12.4% Roman Catholic / Orthodox	60% Denominational 23% Independent 19% Roman Catholic / Orthodox
9.0% Doctoral Universities: Highest Research Activity 19.1% Doctoral Universities: Higher Research Activity 22.5% Doctoral Universities: Professional-Larger 27.0% Doctoral Universities: Professional-Smaller 12.4% Master's Colleges & Universities: Larger Programs 10.1% Master's Colleges & Universities: Smaller Programs	7% Doctoral Universities: Highest Research Activity 18% Doctoral Universities: Higher Research Activity 19% Doctoral Universities: Professional-Larger 24% Doctoral Universities: Professional-Smaller 18% Master's Colleges & Universities: Larger Programs 15% Master's Colleges & Universities: Smaller Programs
51.1% Female 48.9% Male	36% Female 64% Male
4.5% Asian or Pacific Islander 10.2% Black, African American 1.1% Native American, First Nation 2.3% Hispanic, Latino(a) 84.1% White, Caucasian 4.6% Other	3% Asian or Pacific Islander 5% Black, African American 0% Native American, First Nation 2% Hispanic, Latino(a) 90% White, Caucasian
CDOs: 61.8% Non-CDOs: 38.2%	

Interview Set	ATS/COA Database
5% Canada	13% Canada
30% EV 55% ML 15% RC/O	46% EV 38% ML 17% RC/O
25% Related	32% Related
10% Small (1-75 HC) 40% Mid-sized (76-150 HC) 25% Large (151-300 HC) 25% Largest (300+ HC)	15% Small 28% Mid-sized 31% Large 26% Largest
65% Denominational (Den) 20% Independent (Ind) 15% Roman Catholic / Orthodox (RC/O)	60% Denominational 23% Independent 17% Roman Catholic / Orthodox
5% Doctoral Universities: Highest Research Activity 15% Doctoral Universities: Higher Research Activity 25% Doctoral Universities: Professional-Larger 30% Doctoral Universities: Professional-Smaller 20% Master's Colleges & Universities: Larger Programs 5% Master's Colleges & Universities: Smaller Programs	7% Doctoral Universities: Highest Research Activity 18% Doctoral Universities: Higher Research Activity 19% Doctoral Universities: Professional-Larger 24% Doctoral Universities: Professional-Smaller 18% Master's Colleges & Universities: Larger Programs 15% Master's Colleges & Universities: Smaller Programs
50% Female 50% Male	36% Female 64% Male
0% Asian or Pacific Islander 25% Black, African American 0% Native American, First Nation 0% Hispanic, Latino(a) 75% White, Caucasian	3% Asian or Pacific Islander 5% Black, African American 0% Native American, First Nation 2% Hispanic, Latino(a) 90% White, Caucasian

ATS Development Officers Protocol

Introduction and Consent

Thank you for your decision to participate in this one-on-one interview. I am Meryl Herr, research consultant for The Association of Theological Schools. I will begin with a description of the process, then get your consent recorded and proceed with interview questions.

The purpose of this study is to learn more about your experiences in your role at your institution. Your perspectives will help The Association of Theological Schools understand the kind of leadership that will be needed for the future of theological education, and how to support you in your role. The responses you provide will be kept confidential and will only be seen by the research team conducting the study.

To ensure confidentiality, all interview data will be de-identified, meaning your name and the name of the school will not be linked to any disaggregated data on any report. Where excerpts are used, your name will be redacted with "NAME" and your school, with "SCHOOL".

The interview will be video and audio recorded through Zoom for the purpose of data analysis, but as mentioned earlier, your name will not be used in any part of the process of data analysis and reporting. You were previously emailed the Informed Consent Form and provided consent by email. By this consent, you agree to the given information on the form. This includes your rights, responsibilities of you and the researcher, confidentiality, recording, and freedom to leave at any time during the interview. Feel free not to answer any question you find embarrassing or uncomfortable, and remember you can discontinue your participation anytime. Do you have any questions?

[Respond to any questions, then begin recording.]

Please state your full name.

Do you consent to participate in the interview, and to be video and audio-recorded for this interview?

We appreciate your time and willingness to participate in this interview.

Introductory/Grand-Tour Question (3 min)

- [RQ 3] Let's say I want to create a documentary called "A Day in the Life of a Chief Development Officer." My camera crew and I would follow you around for a day. What might we see?

RQ 1 – Role change (5 min)

- To what extent has the nature of the CDO role changed at your institution in recent years? [Clarification: responsibilities, focus, strategy]
    - What has that change required of you?

  How do you think the nature of the CDO role in your institution might change in the future? [Follow-up/Prompt: What will stay the same?]

RQ 4 – Relationship of role to others in the institution/RQ 7 – Leadership Models (20-25 min)

Transition: Let's talk about your role as CDO as it relates to the institution broadly.

- In what ways does your work relate to the institution's mission?
- The majority of survey respondents said they've been given opportunities to collaboratively contribute in institutional planning necessary for the school to accomplish its mission within a sustainable economic model. Has this been true for you?
    - Can you describe a particular time in which you engaged in this sort of collaborative planning with others?
    - With whom do you collaborate? What was your role in the process?
    - How do you understand the concept "sustainable economic model"? What does that look like at your institution?
- On the survey, you indicated that you _____ with a statement about having ongoing conversations to ensure resources are used to fulfill the school's mission.
    - Tell me about those conversations. Who initiates them? Who contributes to the dialogue?
    - What is your sense of the effectiveness of these conversations?
- [RQ 7] The majority of survey respondents said they have led their institution through significant change. Has this been true for you?
    - Can you describe the change(s)? Where did the idea or vision for the change originate?
    - How did you lead the change(s)?
    - What, if any, obstacles did you encounter?
    - What was the outcome?
- [RQ 7] On a scale of one to ten, how would you rate the level of trust between you and the members of the executive leadership team at your institution?
    - Would you characterize that trust as uniform across the whole team? Or, is it more related to the one-on-one relationships among team members?

- [RQ 7] How do you and your executive leadership team make strategic institutional decisions? (For example, are decisions made primarily on the approval of the president or through leadership team discussion, debate, and buy in?)
- [RQ 7] You indicated that you would describe your leadership style(s) as _____. What is _____ leadership?
    - Describe for me how you embody that leadership style in your work.
- [RQ 7/RQ5] How does your executive leadership team identify and develop future institutional leaders?

RQ 8 – Effectiveness (5 min)

- In your opinion, how should a CDO's effectiveness be evaluated?
- How would you define success for a CDO?
- [RQ 10/RQ 2] What sort of training does someone need to be effective in your role as CDO?
  [RQ 10/RQ 2] What types of leadership skills does someone need to be effective in your role as CDO?

RQ 2 – Pathways to the role (3 min)

Transition: I'd like to begin by learning more about how you came to your role.

- [RQ 10] What were some of the biggest challenges you faced when you came into your new role?
- What strengths or competencies did you bring to this role?
- [RQ 10] Some survey respondents believe that CDOs should have a degree in theological education. How do you respond to this?
    - What value do you think a degree in theological education could add to the CDO role?

RQ 6 – Satisfaction (5 min)

Transition: Now I would like to ask you about your satisfaction with your role.

- You indicated that you are _____ satisfied with your role. What do you think has contributed to your satisfaction?
- You indicated that _____ are the biggest stressors you face in your workplace. (Elaborate if necessary.) What resources, support, or training might help you thrive in your work in the midst of these stressors?
- Many respondents indicated feeling some level of burnout in their role. Does that apply to you? If so, what do you think has contributed to that?
- [Confidentiality reminder] In the survey, you indicated that you report to _____. What would satisfactory supervision look like in your role?

RQ 5 – Longevity (3 min)

- What factors do you believe contribute to someone staying in your role for a considerable amount of time?
- [Confidentiality reminder] Many survey respondents have thought about leaving their role. Have you thought about leaving?

    - Can you elaborate on the reasons why?
    - What might encourage you to stay?
- What are your long-term career goals?

RQ 10 – Training (10 min)
Transition: Let's explore what training and professional development might look like for CDO's in ATS schools.

- What is the most challenging thing on your to do list right now as CDO?
    - What sort of training, profession development, or networking opportunities do you need to tackle that?
- If you could design a training/professional development event for CDOs of ATS schools, what would it look like?
    - Where? When? Speakers? Topics? [What would really excite you?]
    - What would you hope to get out of it?
- What other professional events have you attended that are relevant to your work as CDO?
    - What about those events has been beneficial to you?
    - Could you envision ATS offering something like that? What would you like to see?
- Several CDO's indicated that they do not feel prepared to exercise self-care in their role. Does that apply to you?
    - Why do you think so many do not feel prepared to exercise self-care?
    - What might good self-care look like?
    - How might ATS help you?