

Effective Chief Advancement Officer & Provost Relationships: Lessons Learned in Their Own Words

Quotes are drawn from interviews conducted for the "[Chief Advancement Officer Onboarding Center](#)," an EAB initiative that helps incoming advancement leaders hit the ground running in the first six to nine months. They have been edited for clarity, brevity, and to anonymize revealing details.

Take Time to Illustrate the Big Picture

"My vice president for academic affairs used to get on my case about wanting more unrestricted dollars. So one day, I actually made him an ask of him: I said, 'Dr. Griffin, I'd like you to personally make a gift of \$20,000 for this upcoming campaign. It will go a long way to show the campaign committee that you believe in this strategic plan.' He said yes, he'd be open to it, but that he would want to fund graduate work in the political science doctoral program. I said, 'That's not in the strategic plan. Are you sure I can't interest you in an unrestricted gift?'

And I repeated back to him the talking points to him he's always using with me about needing more fungible money. He grinned and said, 'OK, now that I'm on the other side of the table, I get it.' And it was a chance to not only win that argument, but further refine the things we were fundraising for to be more donor-friendly...."

--Vice President for Development, Private Research University

Ask the Provost to Be a Fundraising Role Model

"My old chief academic officer was just disengaged – unwilling to really work past 5 pm and make difficult decisions – but I think that's because my predecessor made him feel that he had nothing to contribute and he really internalized that, telling me, 'I'm not good with donors, you don't want to work with me.'

When I got a new one, I made sure to treat him as my partner in crime. I said to him in his first month, 'Paul, I could never do your job, but with enough coaching, I know you have what it takes to do mine. You don't need to be a road warrior like me – but you need to do enough fundraising to set a good example to the deans. If you won't join visits or get comfortable making the ask, how can you and I ever expect them to?' That got through to him right away. We're always trying to be working on two gifts at any point. It makes him proud to be helping close gifts, and I give him praise, and I talk him up to the president....

I built him up to cultivation visits by first asking him to do stewardship visits. Our culture on campus can be adversarial, legislators are always sending him nastygrams, and he finds it so refreshing to talk to donors and alumni who just love this place...

Something else he finds really empowering is that with our enrollment situation and state funding formula being what it is, if we're going to do something new around here, it really has to be funded by private support. So there's this spirit of 'if you can dream it, you can do it.' He's really open to sharing

an idea for something he wants to do and then saying, 'now help me frame this in a way a donor would find compelling' and he's willing to go make the case to a donor."

--Vice President for Advancement, Public Regional Institution

Meet Them Where They Are

"I engage faculty leaders the same way I address donors. I figure out their interests, I read about them, I talk about things they will want to discuss, and I analyze how they think. My vice president for academic affairs is a political scientist. I begin every meeting casually mentioning something in the headlines that I know he'll get excited about discussing for a bit, and then from there we transition into the agenda. I honestly believe he takes meeting requests from me because I indulge him in his scholarly background in a way I don't think he gets to do much anymore. He's used to being the smartest person in the room, so I let him be."

--Vice President for Development, Private Research University

Leave Time for Unscheduled Discussion to Develop a Stronger Relationship

"I meet with the provost every other week for 90 minutes to review open academic gift opportunities and to discuss moves management on the 15-20 prospects or donors that she has close ongoing and occasional touches with. We typically wrap that up in the first 60 minutes and spend the next 30 minutes discussing other things that are going on – various ideas we had, stuff on her plate, stuff on mine.

Leaving unscheduled time for us to just chat lets us relate on the level of just being executives on a campus: managing personnel problems, dealing with crises, etc. That in turn has made us much closer. She now sticks up for advancement a lot to her deans because she has a better sense of my day-to-day and she validates my budget requests to the CFO, and I defend her to governing board members who are donors who occasionally make comments about aspects of academia they don't understand. It's not transactional. It's allowed me to better navigate campus politics since I have her in my corner and we're allies and we confide in each other."

--Vice President for Advancement, Private Master's Institution

Don't Let the Provost Become Too Reliant on You

"My provost has a voracious appetite for data and information, which I love, because he's brilliant and so curious about advancement – I think he wants to be a president someday – but frankly, I have little bandwidth for all the ensuing back-and-forth e-mails with follow-up questions and more requests for research. So here's what I do. In our monthly meeting, I always bring some other member of my staff – the director of alumni relations, my corporate relations person, our prospect research director, our development officer over the arts, whoever – and I'll ask them to sit in on the meeting. For one thing, it's a good opportunity for them to watch me and the provost discuss and negotiate – to see how things work at that level. But then I'll ask them to present to the provost on something they're working on or thinking about. Sort of like a briefing. The provost will latch on to that and want to keep the conversation going and the two of them will continue to exchange e-mails.

It's great. It shows off the provost how talented my staff is, they're flattered to be asked, and now, after a year, he's gotten to know almost my whole leadership team. The result is now he's comfortable with joining them on his visits, even on travel, so it doesn't always have to be me. If I'm on vacation or away when he needs something, I can forward his message to one of them to handle. I've even had things come up where instead of cancelling my monthly one-on-one if I have something come up, I'll

just send one of the staffers he took a liking to go through the agenda and come back with answers. It's eased a tremendous time burden on me and been a win-win.

I don't want to be indispensable. If the provost can't rely on anyone else, then I'll have no time to work on my own donors. And this way he's gained an appreciation for everything we're doing."

--Vice President for Advancement, Selective Baccalaureate College