

Assessing Institutional Culture and Dynamics

How to Use This Guide

This document belongs to 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.

It includes a list of position-agnostic questions that CAOs may pose to others throughout their listening tour, to Cabinet colleagues, to donors, and to staff in the advancement office.

Assessing Institutional Dynamics

- How do you think the institution has changed over the last 5-7 years?
- Where do you see the institution going in the next 3-5 years?
- In which ways must this institution grow, change or shift in the next few years to continue to thrive?
- How do we compare to our peers – where do we stand out, and where do we fall short?
- I've spoken with the president about the institution's big priorities, but what are some of your biggest priorities right now in your department? If you had an extra day each week for the next year, what would you be working on?
- Who on campus should I get to know early? Are there people you think I should absolutely speak to soon?
- What is the morale like here among staff and faculty [across the university/in your department]?
- Who in the local community should I get to know sooner rather than later?
- What advice do you have for me on navigating the culture of this region?

Evaluating Institutional Culture

- When you think about your role here, what are the things about this college or university that you're most proud or fond of? Are there particular programs, elements of the culture, aspects of our history, something about our students or faculty, etc. that stand out?
- What are the things that people here feel very strongly about, the things that are seen as fundamental or distinctive?
- What sort of accomplishments do folks here really celebrate – what is held up and praised, and who is considered a hero?
- What are the high-profile failures or debacles that people here still talk about?
- What types of people have you found are most successful here? Are there traits they have in common, or similar approaches to how they try to get things done?
- What often surprises new people about working here – for better and for worse? What frustrates them when they try to get things done?

- What advice do you have for me on how this cabinet/leadership team operates? How do decisions get made?
- What have you noticed about how people here communicate? Do they tend to talk on a “need to know” basis or is there a norm of transparency and sharing all details? Is directness considered refreshing, or rude?
- How would you assess the tolerance for risk across the campus?
- How important are values here like stability, tradition, and predictability versus innovation, experimentation, being on the leading edge? Is growth seen as positive, or burdensome?
- Do you consider this an “ask for permission” or a “beg for forgiveness” culture, when it comes to launching new initiatives or deviating from established processes?
- How does staff, faculty and executive leadership relate to one another? Is the culture flat or more hierarchical?
- Do you find that the organization places a premium on consensus, teamwork, broad participation, and sensitivity on process or on getting results?
- I know it’s hard to generalize, but what have you observed about the way alumni here relate to their alma mater? Are there any areas of campus where they have a marked amount of affection or attachment, from your view? Any trends you’ve observed by academic unit or era?

Assessment of the Foundation/Advancement Division

- In what areas does your work come into contact with the advancement team?
- When or how often do you find yourself collaborating with advancement?
- Tell me about the foundation/advancement division that I am inheriting. Is there anyone on my staff you would call out positively or negatively? Anything I should be careful about?
- Is there anything my predecessor did that you would recommend I keep doing? Is there anything you would want me to do differently?
- Is there anything I should absolutely not do? Are there any areas of campus where you think I should devote special attention to repair a relationship?
- How do people here view development/the foundation? What do you think we do well? What do we do that frustrates people? If I led a focus group with faculty, what are the themes you think I would hear?
- Were you involved in the last campaign? How did it go from your point of view?
- What are some of the times when you think that the foundation/advancement division worked well with your department?
- Who do you feel is your key contact in advancement/foundation? If an opportunity arose, would you know how to share it?