

The Chief Advancement Officer & The President: Before Accepting the Job

How to Use This Guide

This Stakeholder Engagement Guide belongs to the "[Chief Advancement Officer Onboarding Center](#)," an Advancement Forum initiative that helps incoming advancement leaders hit the ground running in their first six to nine months.

This document outlines topics of conversation that a prospective CAO ideally engages in with their president in advance of formally assuming or accepting the job.

Assess Mutual Chemistry and Job Fit

Interviewees emphasize the uniqueness of the CAO role in the academy. He or she is likely to spend more time with the President than any other cabinet officer, often on the road away from family, and tasked with speaking on his or her behalf to the institution's most important supporters. CAOs who do not genuinely enjoy spending time with or respect their president will likely find themselves unhappy in their role.

Presidential Vision

- What is the President's vision for the institution? What does the President describe as its major challenges and opportunities? Where does s/he seek to take the institution in the next 5 years?
- How does this vision inform the institution's fundraising priorities? What does the President consider top campus areas or funds for investment?
- What attracted the President to take this role on him/herself at this institution?
- What is the financial and enrollment outlook for the institution? Does the institution currently operate at a deficit or has it in the last three years? If so, what is the plan to address that?
- Does the President envision that s/he will still be in this role at least 2-3 years from now? What would change that?

Presidential Leadership Style

- How would the President describe his/her leadership style?
- How would s/he describe the culture of the executive leadership team?
- What key attributes or values characterize how the senior leadership team operates?
- How long have most deans and vice presidents been in their roles?

President's Approach to Fundraising

- How would the President describe his or her own personal approach to fundraising? Does s/he enjoy it?

- How much time does the President spend on advancement, weekly and monthly, and do they anticipate that this will or should change? What is their level of willingness to travel for donor visits?
- What has been the nature of the president's exposure to development and how would they say their style and skill has evolved over time? Are there topics in philanthropy that s/he has changed their mind about?
- How does s/he feel they are best deployed in fundraising? One-on-one meals? Speaking to large groups? Meeting with donor couples along with their own spouse? What have they learned over time about their strongest contributions to donor cultivation, solicitation, and stewardship?
- How would the President assess his/her own strengths and weaknesses as a fundraiser? Does s/he "make the ask?" Does s/he conduct visits solo?
- What is his/her point of view on the kind of projects and initiatives that best lend themselves to being funded philanthropically?

President's Vision for the CAO Role

- What does the President see as the role of the CAO in fundraising? As a personal principal gift fundraiser with their own portfolio? As a staffer the President on all gifts? As a manager of a team? Some combination of others?
- What does the President see as the role of the CAO on the Cabinet?
- How frequently does the President anticipate that the CAO will join him/her for visits?
- What did the President most appreciate about the last/current CAO's approach to the job or skillset? What does s/he believe the next CAO must know/be able to do to be successful?
- Why is this position currently vacant/open?
- What units or departments would the CAO oversee? Are there broader plans in the works to reorganize or reconfigure the division that the new CAO will be expected to carry out?

Clarify The Institution's Needs At This Juncture

Timing, fundraising maturity, and presidential prerogatives make every advancement vice presidency slightly different. The CAO should endeavor to understand the near-term needs of the advancement division.

However, interviewees note that transitions in the president's office and in the CAO's office often happen within a year of each other, as a new institutional leader seeks to find a fundraising head with whom they are more compatible than the one they inherited. The result is a CAO being onboarded or interviewed by a president who may him or herself be fairly new. As a result, the President may not have the highly-detailed knowledge that a CAO seeks.

State of the Current Advancement Enterprise

- How would the President assess the current sophistication of the advancement operation? What does s/he believe the college does well and where does it struggle?
- What is the understanding of the role that philanthropy plays in the institutional budget? Is there urgency or expectation for philanthropy to ameliorate a troubling financial situation? Does the institution rely on unrestricted dollars to cover its operating budget, or use philanthropy strictly for strategic initiatives?
- How would s/he describe the culture of philanthropy among alumni and donors?
- What is the foundation/governing board's involvement in or perception of fundraising? What about the Cabinet and the deans?

- What has been the institution’s historical fundraising performance: major gifts versus annual fund? Trends in dollars, and number of donors? Recent endowment growth? How close is the institution to meeting its current year goal?

Clarifying Near-Term Expectations and Tasks

- What are the President’s expectations for the incoming CAO?
- What particular goals does the President have in mind for the CAO, development-wise? How were these figures derived (e.g., feasibility study or internal assessment of capacity, cost of upcoming institutional projects, peer benchmarking)? Beyond development, what does the President see as key objectives across alumni engagement, communications, marketing, etc.?
- What is the current status of any ongoing campaign, or when does the President believe any campaign might be launched?
- What are the important decisions, tasks, or projects that will need to be made early on?
- Are there any particularly thorny issues or problematic situations the new CAO will be inheriting?
- Does the organization have any major milestones or deadlines in the coming year or two (e.g., capital projects, bicentennial, grant renewal deadlines, accreditation, campaigns)?
- How does the President envision the advancement division will change in the next 2-5 years? What is the level of willingness to invest additional budget and staff into the division in the coming years?

Lessons Learned in Their Own Words

Make Declarative Statements of Your Plans to Test if the President Agrees With Your Vision

“In negotiations with the president, I wanted to be very clear about the kind of leader I intended to be. I wanted him to know what he was getting. I said to him: ‘I am not a rainmaker. If you’re looking for somebody to spend most of their time traveling across the country, somebody who you think has a rolodex of wealthy contacts from past jobs and is going to bring in a \$20M gift in the first year, that’s not me. I am a *builder*. I want to build an entire organization of highly-trained and well-supported fundraisers. I want to build teams.’ Another thing I told him was: ‘I’m interested in sustainable fundraising growth, not one-hit wonder-type gifts.’

He later told me that’s when he knew he wanted to hire me, because he respected that I was willing to make that statement.”

--Vice President of Advancement, Canadian University

An Interview is a Two-Way Street

“When I took this job, I was very authoritative and candid, which I think really projected competence and confidence. It’s not just you selling yourself, it’s also you saying what conditions you need to be happy and successful in the job, and that shows you know your self-worth. Yes, that includes compensation and benefits and so on, but other things as well.

I said: ‘Here are the things I need in a President to be effective.’ That I am an extremely loyal person as long as I know my boss is being honest with me. That I don’t need any job bad enough that I’ll tolerate being yelled at. That I can’t do my job effectively if he won’t give me at least one day a week for donor visits.

I told him my father was in hospice and I need time each month to visit him. I also said I have young children, and so I really need to avoid traveling more than three days straight in any month.

I also said it was my dream to someday oversee development for a hospital, that I have a real passion for working with grateful patients, and that was one reason I was very interested in this job. I knew

the VP over at the academic medical center campus was retiring soon, and I was honest with the President that I'd be very interested in adding that to my division were that situation ever to arise."

--Vice Chancellor of Advancement, Public Research University

Lack of Personal Chemistry with the President is Nonstarter

"Life is too short to work with a president who doesn't have heart, a president who is not 100% engaged, a president who doesn't have integrity, or a president who doesn't share your values. It's just that simple. This title is not worth it to spend dozens of hours a month on a plane with somebody you do not enjoy being around or respect.

I get asked to interview for jobs from time to time. And I will not consent to a so-called airport interview or group meeting with the search committee until I first have a meal with the chancellor. Because if right away, I don't immediately like him or her, there's no point to the rest of the process.

This job requires you to go out there every day and sell the president's vision. And if you don't think she/he has vision, or if you don't agree with it, then the job will never feel right...

This job is more like a marriage than a partnership. You spend a lot of time together, often talking about personal things. I have to deliver feedback to the president about his performance on a visit or giving a speech that isn't always easy to hear, and he has to still like me afterwards."

--Vice Chancellor of Advancement, Public Regional University

Listen for How Well the President Understands the Process of Development

"I try to really listen carefully to how the president talks about development. Does he sound like he thinks gifts arise from sheer likeability or does he grasp that a donor is buying into a vision and seeking to make an impact? Does he think it's all luck and just knowing the right people and holding fancy events, or does he understand that there's this bigger machinery here of visits and qualification and cultivation and you have to trust in the process to build a pipeline?

I find that a president who actually understands what your MGOs do all day is less likely to make unrealistic pronouncements about campaign goals, because they understand the mechanics that drive results in this business."

--Vice President of Development, Private University

Presidential Prerogatives and Institutional Milestones Shape the Job

"Understanding what your institution and president needs from you isn't part of the job. It is the job. Being the CAO at an institution with a president who asks you to staff her while she travels two weeks a month to solicit principal gifts in the heat of a campaign is an entirely different job from professionalizing a shop and instilling a culture of philanthropy at a place that has traditionally underperformed in fundraising. Forget the first 180 days. You need to know in the T-minus 60 days what is expected of you – before you sign the contract."

--Vice President for Advancement, Small Baccalaureate College

Accept That There Will Be Surprises

"You should ask detailed questions about development, and the President will answer your questions to the best of his knowledge. But that's the problem. That's the rub. He or she likely lacks very detailed knowledge of what's really going on under the hood in the development shop, and it's just not easy to ask those kinds of invasive questions about data and metrics and goals and deans and board politics and toxic personalities at this stage in the process. So, sure, do your homework, but accept that there will be some surprises."

--Interim Vice President for Development, Private University