

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

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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.

## Developing a Foundation for a Strong Partnership

### Set Expectations Early On For Donor Visit Time and Travel

"I have a problem my peers would kill for: I have a dynamic, visionary, charismatic, aggressive President. But everybody on campus wants a piece of her...

In my first few months, her office would regularly give me about two days a month for donor visits and travel. That's not *nearly* enough. But frankly, I felt so lucky just to be working with someone so talented that I pushed the issue down the road and figured: 'I can use these early first few months to get settled anyway.'

But six months in now, I'm trying to get her and her chief of staff to give me more like ten days a month for donor visits and travel. And since I never voiced any concerns with that small allocation early on, it's now difficult for me to reset expectations."

--Vice President of Development, Public Research University

### Recognizing Scheduling Can Be a Pain Point and Proactively Tackle Barriers

"I would love to tell you that my President and I regularly engage in philosophical discussions about philanthropy and the institution's future. Actually, we mostly argue over scheduling.

We are now finally at a point where the President blocks off a certain number of days each month explicitly for either local donor visits or travel to designated regional markets and allows my team to fill in these times as we secure meetings.

Before, though, the President and/or his executive assistant used to insist on analyzing each request case-by-case before it is added to the approved timeframe. And it bothered me so much because I think it is a fundamental issue of trust. Don't make me have to make a federal case out of each request for an hour of the President's time.

I would recommend that any CAO negotiate in advance of accepting the job a minimum amount of time from the President. 5 to 10 days a month is standard, with at least one full week a month for travel, especially if the institution has a national alumni base."

--Vice President of Development, Private Master's University

## **Unchecked Bad Habits Can Evolve Into Standard Operating Procedure**

"I know [my President] is doing a lot of donor touches and visits without my office really knowing it or coordinating them; not that she's going rogue, but she has developed some really strong partnerships with philanthropists locally. I don't want to insert myself into those and get between them, but I can't support her if I don't know what's going on. Sometimes, I feel like there's two development operations: the one I run and the one she independently runs...

Last week, she left me a voicemail about needing a proposal for a \$1 M solicitation for a meeting four days later for a prospect I had no idea she had been talking to. How do we know this \$1 M ask shouldn't be \$5 M and we're not leaving money on the table? Has she seen the research we have on him? Can I be certain no development officer from any of my units isn't actively trying to get visits with this guy right now? I am thinking: 'This is incredible, but this has to stop.'

I knew this was going on when I started, but I initially figured it was getting organized with one of my deputies in a way that I didn't need to be involved in. I'm nervous to put my foot down because I'm beginning to suspect that she selected me precisely because she thought I would let her keep operating this way."

--Vice President of Development, Public Research University

## **Build Strong Relationships with President's Office Staff**

"I have built an independent relationship with most of the president's office staff, including his executive assistant and scheduler. Sending chocolates or flowers is completely worth it when they seemingly move mountains to find an hour for the President to come by a meeting – and increases the likelihood they do it next time."

--Vice President of Development, Regional Public University

## **Ongoing Success and Strengthening the Partnership**

### **Accept That Your Job May Evolve Beyond Initial Areas of Focus as the President Needs**

"It is tempting to see becoming the VP as your opportunity to finally put into practice all those ideas and philosophies you've developed over the years. But having been the VP at a couple of places, I've come to realize it's not about you as much as it's about your institution and what it needs you to be at that moment in time...

My first advancement vice presidency was a more-or-less unblemished success: we got the board focused on the right things, closed some big gifts, overhauled annual giving, and so on. After a few years, a larger institution with a President I knew asked me to become their chief advancement officer, to do all the same things there, and I leapt at the opportunity.

Well, shortly after starting, the Vice President for Marketing and Communications shared her intention to retire, and the President asked to merge it under my division. I thought, sure, I'm a Type-A kind of person, this felt like a promotion. Well, this is where 'the best-laid plans of mice and men often go awry,' as they say... I immediately had to take care of several issues involving [personnel], [the legislature], [crisis management], and other areas.

Whole days go by sometimes now where I spend less than an hour thinking about fundraising. Luckily, the President let me hire and appropriately compensate a very strong #2 who does manage development day-to-day, and occasionally, I find myself getting jealous of her calendar.

Look, I've made only halting progress against the things I feel I was hired to do, to be honest. But what I am confident about is that I have made progress against the things my university needed. I guess the moral of the story is: sure, go into the job with goals, but you are first and foremost an officer of your college before you're a development leader, and your job is to put the needs of your college first."

--Vice President of Development, Private Master's University