The Chief Advancement Officer & The President: Stakeholder Engagement Guide

How to Use This Guide

This Stakeholder Engagement Guide 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. See the end of this document for further EAB resources on this front.

This document outlines key questions that undergird the effective relationship between a college or university chief advancement officer ("CAO") and institution's chief executive ("president", or sometimes called chancellor). Incoming CAOs should consult it to plan how they will engage him/her and to develop their working dynamic.

Context and Intelligence to Gather in Advance

Before the CAO accepts the role, s/he has ideally engaged in-depth dialogue with the President on his/her vision for the institution, personal style, and mutual expectations. As a result, it is likely – and even advisable – that many of the questions below been explored prior to the CAO's first day on the job.

EAB recommends review of "Before Accepting the Job" in the Onboarding Center for an in-depth discussion of those issues and identify which remain unaddressed. However, there is a small amount of necessary overlap between the topics discussed in that document and in this one.

Initial Meetings

New CAOs often feel torn between the time spent with their own division and the time they wish to spend working with or shadowing their new President. In the early months, many CAOs will meet with the President at least weekly, still often feeling they have insufficient time for important conversations that have to take place. Some CAOs recommend trying to get off-site with the President early on: time spent in travel away from campus allows for longer hours of uninterrupted conversation with an intimacy and candor that is difficult to achieve while in the office.

Many CAOs will prepare a formal "first 90 days"-type plan for their President, explaining how they plan to spend their first three months engaged in widespread consultation, and alerting them that they will provide a longer 1, 3, or 5-year plan for advancement for them to review after that point.

Below are questions that can help with both initially building the relationship and gathering information for charting out the longer-term advancement division plan.

Shared Leadership of Development and External Relations

– How do you think the CAO should be involved in institutional strategy and priority-setting? Are there areas where you would view it as inappropriate for me to weigh in?

- Where do you see opportunities to achieve better alignment between the president's vision and the strategic plan and our development priorities?
- How do you need to be apprised of my interactions with board members? What do you see as the role of the CAO in board governance and in board relationships?
- Part of the CAO's job is to have the pulse of alumni sentiment on particular issues. How would the President like the CAO to share those opinions? Is s/he interested in hearing them?
- Do you involve the CAO in crafting the President's external reputation or image, such as having input on public relations activities or the substance of public speeches and remarks? To what extent?
- How comfortable is the President engaging with the media, external constituencies like civic groups, or the Chamber of Commerce? Foundations or corporate groups? Government or legislative actors?

Working with the Cabinet

- Do you have a chief of staff, special assistant, or other staff member who helps coordinate your work? For what types of matters should I reach out to them instead of you?
- On the Cabinet, whose judgement do you most respect or admire and whose advice would you recommend that I seek when I need help?
- How would you like me to keep you apprised of the division's work with other vice presidents and deans? What about their fundraising-related performance do you need to know?
- What expectations do you set for development work as a part of other Cabinet members' jobs?

Personal Approaches to Fundraising

- How do you feel you are best deployed in fundraising? Do you enjoy one-on-one meals? Speaking to large groups? Meeting with donor couples along with your own spouse?
- What have you learned over time about the best way you can contribute to donor cultivation, solicitation, and stewardship?
- What are your favorite and least favorite aspects of development work?
- How much time do you currently set aside for donor visits and travel, on a weekly or monthly basis? How should this change in the months ahead, in your opinion?
- Which particular top prospects and donors do you enjoy spending time with? Do you consider any of them friends? Who are the prospects or donors that you find challenging or frustrating? Why?
- How do you prefer to be involved in alumni engagement and alumni programming?

Logistics and Ongoing Collaboration

- What role will your spouse play in fundraising? Should I ever communicate with him/her directly?
- Are there individuals in your office that I'll be working with regularly?
- How can my office work with yours in managing this aspect of your calendar? How frequently do you travel and how is this managed? Who in your office can make scheduling decisions on your behalf?
- How do you prefer to be briefed on prospects and donors? Do you like receiving materials in writing or verbally? Are you open to practicing or role-playing ahead of visits?
- What is the process for authoring and sending communications to prospects or donors on your behalf?
- How will you keep me in the loop when you interact with prospects or donors we're actively pursuing?

– How do you like to manage donor call-lists (sometimes called “call time” or “call-backs”, to have 5-15 conversations with prospects or donors)? Will you block off time each week for calls?
– How do you prefer to receive feedback or coaching in general, and particularly after donor visits?
– What will be the structure of our ongoing meetings (see below)?
– Beyond ongoing principal gift pursuits, how much do you want me to keep you apprised of key metrics and events in the advancement division?
– What areas across development, alumni relations, marketing and communications, etc. are you particularly interested in being updated on? Are there any areas that are not interesting or important to you?

Ongoing Collaboration

Virtually all CAOs aim to conduct at least one business meeting a week with their President, but there are at least three distinct types of meetings. At some institutions, these are all merged into one regular check-in meeting, while at others, particularly larger or research universities, there may be up to three distinct weekly meetings each with their own set of participants:

- **Meeting Type #1: Advancement Updates**

  A *weekly or biweekly* meeting to give notice of and seek input regarding notable goings-on in the advancement division, similar to the meeting any other cabinet officer might have with the President.

  Common agenda items include governing, foundation, or alumni board governance, divisional strategy, philanthropic priorities, cross-division partnerships or challenges, budget requests, upcoming events, major personnel changes or challenges, updates on important initiatives, trends identification, problem-solving, etc.

  Attendees are typically limited to the President and the Chief Advancement Officer, though the president’s chief of staff may attend as well.

- **Meeting Type #2: Principal Gift Pipeline**

  A weekly or biweekly meeting to review moves management, communications, and planning for prospects and donors with whom the President is playing an active role in cultivation, solicitation, or stewardship. Between 3 and 6 cases might be discussed in-depth at each meeting, with a dashboard offering written updates on up to 10-20 others also in active pursuit but not up for discussion here.

  Attendees include: the President, presidential office staff (e.g., president’s chief of staff if s/he is highly engaged in philanthropy, president’s scheduling assistant), Chief Advancement Officer, the senior advancement officer overseeing principal gifts (such as an AVP for Principal Gifts), the senior stewardship or donor relations officer, and the staff member who manages written materials for principal gifts (i.e., correspondence, briefings, white papers, talking points)

- **Meeting Type #3: Travel Logistics and Scheduling**

  Where advancement produces a high volume of requests for the President’s time, a standing weekly meeting or conference call exists to consolidate, compare, align, and approve, modify, or decline requests for the president’s time, especially for travel to regional markets.

  Invitees to this meeting often include the President or the CAO, but they may not always attend; it is not uncommon to delegate this decision-making to staff from the president’s office and from principal gifts/development events, asking them to elevate requests only where they cannot come to agreement.

  At some institutions, the president’s partner or a family member is involved in this meeting, particularly if they frequently travel alongside the president or maintain their own travel schedule on behalf of the institution.

Additional Regular Meetings

At private institutions where the chief advancement officer plays a prominent role in board engagement, it is also common to have regular monthly meetings set aside to prepare for upcoming board meetings.

Some institutions also conduct regular “time audits” or “check-ups” quarterly or semiannually to discuss how the President’s team was deployed for advancement over the previous time period, and if the process or time allocation needs to be tweaked in the coming months to serve institutional priorities.