Maximizing the Listening Tour: Lessons Learned in Their Own Words

How to Use This Guide

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.

Skip the Listening Tour at Your Peril

"I once heard a CAO at a CASE conference say 'the listening tour is dead – presidents now want you to know what you're doing on Day 1.' And I thought that was such an arrogant, self-centered, presumptuous sentiment. First, of course you have a sense on Day 1 of the changes you need to make – but the listening tour helps you figure out if your instincts are on-target. The listening tour is also just as much for the rest of campus as it is for you; it's a chance for every dean and director to be put at ease.

But the biggest reason I really struggled with that statement is that I learned it the hard way. I have been lucky to be a CAO at 3 institutions. But at the first place, I honest-to-goodness failed. And it's because I hadn't done enough consultation. I thought people would defer to me because of my title. I thought I had the authority to carry out my vision because of my expertise. I didn't realize how powerful the faculty were here. People were telling me the problems with the plan, but I just couldn't hear them. Boy did I learn.

I think many CAOs are deceived about the extent of their mandate if they came from an institution where they rose through the ranks, built the team, had some real successes, had earned a lot of political capital. But at your new institution, nobody cares about what CASE awards you won. You have to show *these* people you care. The secret of the listening tour is that it is not about you. It is about them. "

-Vice President of Advancement, Public Research University

Plan Two Tours: One for Listening and One for Sharing Back What You Heard

"I conducted my listening tour in a very intentionally phased way. First, I did an initial wave of meetings with about 10 to 12 key internal stakeholders across the board, Cabinet, and deans. These meetings were very personal: I spent usually the first 30-40 minutes getting to know them as people, asking them to tell me their story, before I then told my own and how I came to this profession and what I believed about this institution. Only then would I ask them a few choice questions – usually open-ended – and take copious notes.

Next, I spent the next two weeks internally focused, getting to know individual members of my team, looking over data, better learning the campus, meeting with prospects and donors, and so on.

Around this time, I formally started on the job. I went back to those 10 to 12 key stakeholders. This time, I had very specific questions for each one. I also laid out for them my working hypotheses about the institution, saying 'here is what I think I'm going to focus on – does this make sense to you? What would this mean for your unit?' They gave me a lot of feedback. Armed with that, I wrote up a 5-page white paper that was basically my assessment of the division and what I needed to focus on, outlining five key priorities, including areas where I saw a need for investment.

I sent it to the President and asked him to review it and for us to talk about it once he returned from a holiday break. He loved it. It helped that I had specific examples of contributions from folks across the campus, which he couldn't refute – they were the impressions of his team, not just my opinions. The plan was well-socialized before he even saw it. It included our goals, and the President was effectively signing off on those goals.

I continued to socialize that white paper among staff in my unit, other stakeholders I came across, board members, whoever else, for the next year. It eventually grew to almost 20 pages with additions and refinements. But it was an excellent conversation starter and really demonstrated transparency because I was essentially showing my playbook to anyone who asked."

-Vice President of Advancement, Canadian University

Use Intel Gathered During Tour to Segment Potential Requests of the President and Cabinet into Two Categories

"During the listening stage, I try to figure out what I'm hearing that is going to require me to go to my boss or the CFO or others and make some big requests.

There's two negotiating styles: 'foot in the door' (ask for a little, then gradually ask for more) versus 'door in the face' (ask for more than you want, knowing you will get less, in order to get some of it). I know it sounds bizarre, but I like to create a document where I figure out when I will take which tact.

On the one hand, 'foot in the door' won't outrage anyone, but when you're still in the grace period, I think you can make some 'door in the face' asks and get away with it. For example, ask for 5 new staff so that you can end up with 3. Say that you need an entirely new vendor so that you can get IT to prioritize your division to create a workaround or patch for something you need."

-Senior Vice President of Development and Alumni Affairs, Private Institution

Avoid Making Initial Commitments or Approving Any Requests Right Away

"My director of stewardship's first request of me was if she could consolidate eight school-specific print donor honor rolls into one university-wide digital publication. I said sure, that sounded sensible, go for it. What I didn't realize that meant was my first meetings with all our deans would be me saying, 'hi, I'm new here, and we're taking something away from you.' "

-Senior Vice President of Development and Alumni Affairs, Private Institution

Leverage Your Listening Tour to Help Assess the Current Advancement Team

"Before I started at [my last institution] I was able to spend several months preparing. So, months out from starting in my new role, I began to meet with stakeholders. I had probably 25 meetings. I went to volunteer gatherings and donor events and sat in on Cabinet meetings and had a lot of one-on-one lunches and coffees. I would ask a few questions and then I would just listen and listen and listen. People had so much on their mind and they knew what they wanted to say regardless of what I asked. This was a place that had had some challenges.

After a while, I began to feel that it was not productive for me to be opening up Pandora's box by asking these weighty questions, hearing folks' heartfelt answers, and then just recording it in my notebook and walking away. So I gathered the senior staff in advancement, and I relayed back to them: 'Here are the themes I'm hearing from all of you and from others – about our successes, our setbacks, our strengths, our gaps, and what we need to do to do better.' Together, we divided them into four big themes, and I then appointed a team of three people to work on each of the four areas, to write a memo and analysis with paths forward, telling me how I should proceed when I arrived and what my options were. I checked in virtually with each team every other week, going back and forth with ideas, copying other folks in the division and asking for their feedback at times. I was candid with these 12 people, saying: 'I'm relying on you to tell me how to lead.' They became my transition team, essentially. When I arrived, I had four detailed and thoughtful reports waiting for me. And those four reports became the basis of our division's strategic plan for the next several years.

Years later, I found out how much that meant to people. One person told me recently: 'Even before you started on campus, we were predisposed to be loyal to you, because you trusted us from the get-go and we felt you had no agenda except to empower us to solve our challenges, resolve our conflicts, and reach our potential.'

This activity also helped me assess the team. Some rose to the occasion and showed me they were analytical and creative. Others revealed a low level of engagement or their limitations. I was watching who contributed, how they dealt with each other, how they dealt with me, who was knowledgeable about what, etc. The process was highly instructive and I would recommend it to anyone."

-Vice President of Advancement, Canadian University

The Value of Meeting with Every Single Staff Member

"I know it will sound crazy, but I had a 15-minute meeting with every staff member, no matter how junior. It took me four months to get it done. I asked each person three questions: 'What is one thing you would want me to do? What is one thing you would want me to not do? And beyond that, is there one thing you would like me to know?' I made clear that if I learned anything illegal or unethical, I would be forced to refer it to HR and it would then be out of my hands; I said I would be discrete with everything I learned, but couldn't guarantee that I wouldn't share their comments with their boss; and I promised that while I would try to look into every problem brought to my attention, I would not be able to solve every one of them, but that I would at least dignify and acknowledge their concern, and that me or another member of my leadership team would eventually follow up on everything I heard that required resolution, but that it might not be for several months. My assistant sat in on each meeting and took notes and drafted e-mails for me to follow up on items and kept a tracker on where we are at on follow-up for individuals.

Well, I learned a lot. I learned the prospect researchers believe HR has misclassified their jobs, that the dean of social work falls asleep in donor meetings, that the athletics fundraiser resents having his office in a different building than ours, that nobody trusts the prospect ratings, that the alumni golf tournament requires about 200 hours of staff time and raises about $6,000, that scholarship donors basically weren't getting stewardship, that we are paying through the nose on catering to a company owned by somebody's cousin and so on. I heard a lot of good ideas, some of which I eventually implemented. Somebody cried. I can't remember about what.

At times, I felt more like a mayor than a fundraiser. Some people have such minor issues that really troubled them, but they were keeping them from doing their best work. I mean, for example, I got the stewardship team their own color printer. I got the events team permission to hire work-study students. You'd think I'd told them they won the lottery.

Some problems I have not been able to make headway on. The CIO won't let me do everything I want with technology, for example. And some requests were just unrealistic - every department wants another FTE, obviously. But I have tried to be direct and follow up with each person.

Meeting with every staff member is the smartest, most grueling thing I've done since I got here. Some of what I learned informed and enriched our strategy. Some shaped my personnel decisions - I learned a lot about my direct reports and who was in touch with their teams. Others just won me a more engaged and loyal staff. I earned the trust and respect of a lot of people. It was all worth it."

-Vice President of Advancement, Mid-Sized Public Research University

Leverage the Honeymoon Period to Connect with Disengaged but Open-Minded Donors and Supporters

”I wrote up three letters that went out to about a hundred people: one for rated prospects who we’d long failed to get a visit with, one for donors who had drifted away from the organization in the last 5 or 10 years, and one for donors who we believed were far-undercapitalized, capable of giving much more than they were but we weren’t their top priority. Each was a little different in tone, but was a chance for me to introduce myself, talk about my orientation to the work and why the institution’s values resonate with me so much, and offered my contact information. I had my staff send these on my behalf as both e-mails and printed letters in the mail. Based on consultation with gift officers, some of these letters actually included an ask for a visit; others simply said I’d be open to meeting if they were interested.

We got a huge yield from these. Much more than we’d been anticipating, which of course became its own problem, but it was a good problem to have.

The occasion of a new chief advancement officer is an opportunity to reach out to people who have let their connection to the university lapse. Maybe they didn’t like the last president, or a gift didn’t get used the way they thought, or something happened. But usually, people are sensible enough to realize you had nothing to do with whatever happened then, and curious enough about you to give you a chance.”

-Senior Vice President of Development and Alumni Affairs, Private Institution