

Navigating Optics and Perception as The New CAO: 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.

Communicate with Precision to Avoid Being Misunderstood

Take Care Not to Speak Candidly Before You Know Who You Can Trust

"I know some CAOs say you should be 100% transparent with your leadership team, but I disagree. When you're a new CAO, you really have to be discrete and keep your cards close to your chest until you figure out who you can trust. Do not assume any of your conversations are private. Imagine your e-mails and voicemails are forwarded (and at a public university, they could be public records). That doesn't mean you can't have conversations of importance, but you have to make assertions that are fact-based, and be prepared and constructive in every conversation.

I made that mistake. I began to confide in and complain to my deputy almost right after I arrived, and later I learned he was sharing all that with the board chair, including some of my unvarnished observations about the board that were not very generous and some of my pessimism about the president's vision. I guess in my mind I thought I was showing transparency, and it was nice to have somebody to externally process what I was experiencing, but I realize now it was a sign of weakness that I couldn't just be more restrained."

--Vice President of Development and Alumni Relations, Private Research University

Some May Seek to Take Advantage of Your Lack of Knowledge of Campus Dynamics

"Check with the folks around you before you take meetings, or take them privately. One month in, I got an e-mail from a department chair about a fascinating grant idea. The corporate and foundation relations directorship was vacant at the time, and I was eager to develop relationships with the academy, so I responded enthusiastically, we met the faculty club, and we had a wonderful conversation. The next day, the provost avoided eye contact with me and seemed aloof at a cabinet meeting. I didn't know why.

Only two weeks later did the president's chief of staff take me aside and explain word spread on the small campus that I'd been seen 'out in the open cavorting with the enemy' – a longtime thorn in the side of administration, who fought his dean on everything. I had no idea.

And honestly, I never really knew how to fix this either, since it seemed so petty that it felt awkward even bringing it up. I feel to this day [the provost] never really trusted me as a result of that meeting."

The CAO is Representing the Division in Every Interaction

"My leadership team knows me well, but for the wide array of internal and external stakeholders that I might talk to in a given day, that could be the first time they've ever met me. And if I seem short, or clueless, or annoyed, then that is the perception they will take away of the whole division.

So I work to project confidence and optimism in every meeting. Even if it's my sixth one that day. I have to take a few minutes and psyche myself up for it. The CAO can never, ever have a bad day."

--Vice President for Advancement, Mid-Sized Regional Public University

Hierarchy Amplifies the Volume of Your Words

"I have to calibrate my words because I've learned that they travel fast. If I say, 'budgets are tight this year, we may not be able to refill that vacancy for a few months', then within a few days, somebody might pop their head into my office and ask: 'Are we going to have layoffs?' People hear what they want to hear, or what they most fear you're about to say. If you lose your cool once and raise your voice, then congratulations, that's all anyone will think about you for months, is you're a bully, or a jerk. I try not to ever interrupt anybody. That's a bad habit of mine.

If you have any media training about sticking to your message and your talking points and reframing any question around what you want to answer, it's useful to summon that for big meetings: consider how any statement might be quoted later out of context, or how people might fixate on one poor offhand comment or bad joke and make that the whole story. I sometimes try to think how my comments would be perceived by an invisible stranger who just wandered into the room and is observing the meeting without knowing any of us."

--Vice President for Advancement, Mid-Sized Regional Public University

A Relentless Focus on 'How it Looks'

"I've tried to be as careful about spending as anyone, but I have to say, going from a private to a public, the focus on 'how it looks' has been relentless and surprising. Was the campaign launch gala too over the top? What would the governor say if he knew we had an open bar at the event? I get upgraded to first class because of my many years of flying on Delta, but I sometimes self-consciously turn it down, because in this state capital where I work and fly into, I know somebody is going to say: 'Did you know the bigwigs at [XYZ State University] are flying first-class everywhere they go now?' I'm so nervous I'm going to cause trouble for the university."

--Vice President of Development and Alumni Relations, Public Research University

Do Not Criticize Your Predecessor

"I fight the urge to criticize my predecessor even though I have come to feel a few things were wrongly decided. He was not popular with the staff. But I just say, 'Hindsight is 20/20. I have to assume [My predecessor] was doing the best he could with the information he had at the time and given whatever trade-offs he had at the time. I'll try to do the same.' "

--Vice President of Development, Private Baccalaureate Institution

Build a Personal Brand that Neutralizes Perception Issues

Determine the Narrative Around Yourself

"In any leadership vacuum, people are desperate for information. If they don't have any, they'll make it up themselves. So you have to feed the beast, but give it a narrative that you want to be amplified. The human brain loves stories, so give them stories to share with one another.

In my case, I knew folks here were suspicious of me when I arrived, wondering if I could really relate to this region, since my last institution was a very different place, and I was the only woman on the cabinet.

So in every group and meeting I was asked to present at for the first few weeks to introduce myself, I found ways to work in a few stories. I told one about going shooting with my dad when I was young and getting a hunting scholarship to go to college; about growing up in a hardscrabble region similar to this one and how my mom getting a nursing degree when she was in her 30s changed our lives (we have a very strong nursing program); and a story of a past big gift I brought in where I met with the donor sixteen times before he signed the agreement, to show my persistence. Those were stories meant to show particular things about me. I wanted them to be colorful and to circulate.

Every new CAO should ask themselves: what are the stories about you that you want people to share? You have a big voice, so fill the echo chamber. Determine what you think the narrative should be about yourself, pick a few stories that illustrate a point, and tell them over and over again, and soon, people start telling them to one another."

--Vice President of Development, Private Baccalaureate Institution

Assume Your New Staff is Googling You and Asking Mutual Acquaintances About You

"I felt for the first few weeks of my tenure that my annual giving director was aloof and awkward around me. Finally, I pulled aside a member to my leadership team, exasperated, to ask them if I was imagining it or not. Turns out everyone had heard what happened at [my last institution], where I closed the phonathon and, they found some remarks I made 10 years ago to [a nonprofit news site] about direct mail dying out.

I felt so naive for not picking up on that. Honestly, I had no intention of that - our donor base here is older and very loyal, so it wouldn't even make sense. But I realized I had never done a proper sit-down with the annual fund director, so I asked her to come brief me on our program and I made a point to say directly that I had no intention of meddling in her program."

--Vice President of Advancement, Public Master's University

Understand How You are Viewed in the Context of Your Institution's Culture

"It's unfair, but if you're the 'first' anything to be in your role — first woman, first person of color, first layperson at a religious college, youngest ever, first non-alum — you'll be hyper-scrutinized. That doesn't mean you can't stand out or be yourself! You were picked to bring new ideas after all, and leadership requires being authentic.

And some level of 'personal branding' is desirable even — one mentor of mine was known for her gorgeous brooch collection, another for being the dapper 'the bow tie' guy. In this industry, we want to be memorable, and sometimes larger than life. However, I wish I'd learned earlier on that not being deferent or conservative enough about institutional culture can cause your personality to distract from your program. For example, here's another nugget of wisdom my executive assistant also shared with me: 'how unfortunate it would be if the quotation in your signature line distracted from the contents of the email above it.' "

--Vice President of Development and Alumni Relations, Public Research University

Consider How Your Appointment is Viewed

"If you are an internal appointment, who are the segments of campus that suspect you will be sympathetic/antagonistic to their interests? For example, you likely bring to your role a history of previous campus entanglements. Which segments of campus suspect you will not be kind to them interests and how can you proactively or publicly mollify those concerns?..."

I previously oversaw development and major gifts at the school of business. I knew early on that I had to build relationships with nursing and education deans, who might have assumed I would only focus on schools with the most affluent prospects. To avoid being accused of playing favorites, I have to sometimes even 'ding' the business school in small ways.

At a previous institution, I remember the CAO publicly entrusted the internal runner-up to his role with a high-profile visible and initiative to make clear she valued him and trusted him. It sent a signal to that person's network and friends across the university that they had nothing to fear."

--Vice President of Development and Alumni Relations, Public Research University

You are a Public Figure Now

"I was the behind-the-scenes making-the-trains-run-on-time-type AVP at three bigger institutions. On campus, I was a senior administrator, I guess, but off campus, I was pretty anonymous. But when you're the president of the foundation at a place like this — in a city where the university is the largest employer, the largest hospital — you're kind of a local celebrity. I've been asked to speak to the Chamber of Commerce, to chair the United Way campaign, to give interviews to the local newspaper. You just have to be on your best behavior all the time. When you take your dog for a walk, you better never forget to pick up the poop. Don't swear in public. Don't double park if you have a vanity plate. If you sit at a bar in a restaurant, you shouldn't have more than one or two drinks.

People notice this stuff. But you can't let it get to you or make you hide out at home. Everybody's toddlers make a mess at Panera Bread, right?"

--Vice President of Development and Alumni Relations, Private Research University

Conduct an Objective Check-In to Take the Temperature of the Team

"After about six months into the job, I brought in an external facilitator who I once used as a leadership coach years earlier, and I asked her to do a series of 15-minute interviews with a few deans, my president, a few peers on the Cabinet, and most of the members of my senior leadership team, as well as a focus group with some of our gift officers. She asked them three questions:

- What are your early impressions of the leader's strengths?
- What are your early impressions of the leader's development needs?
- What suggestions would you give the leader to help her become more successful?

And she wrote me a report with key themes, not calling anyone out by name. I also shared a copy with my president. Most of it, I could have written myself. But I slept so well that night, knowing I didn't have blind spots, and that the way my university perceived me was more or less how I wanted to come across."

--Interim Vice President of Advancement, Regional Public University