

Planning the Listening Tour

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.

Why Do a Listening Tour?

Most CAOs dedicate their first few months to a broad and intense "listening tour" with stakeholders on and off campus. This document offers organizing principles and recommendations for effectively executing this tour.

Every new CAO essentially spends their first six months as their own campaign consultant conducting a feasibility study on their new institution. This generates an immense amount of information that ideally feeds into their planning loop, giving them a sense of both long-term priorities and direction and short-term needs for course-correction, personnel changes, and trouble-shooting.

CAOs should get all they can from this honeymoon period while they're still considered a change agent and fresh set of eyes. After their first year, CAOs will not be able to receive direct feedback from key stakeholders without being the subject of that feedback. It is essential that CAOs leverage this opportunity to identify genuine stakeholder concerns and learn more about how the foundation/advancement office is perceived on campus. This is also true for prospects, donors, and volunteers, who will perceive you as separate from the past administration for a short while.

Moreover, every fundraiser knows the best way to gain someone's trust is to listen to them, ask them questions, and seek their advice; fundraisers who've risen to become the CAO know their task is no different. Stakeholders will be more likely to support and defend the initiatives of the CAO if they feel they had a role in shaping them and if they've gotten to know him or her as a person.

Listening Tour Logistics

- If possible, begin the listening tour even before you technically start in the job. This is precious time when stakeholders will feel particularly flattered you reached out and when you are not inundated with e-mails, requests, and meetings. Some CAOs began meeting with stakeholders as early as three or four months before starting their new role, giving them plenty of time to digest and process, and even meet a second time with more detailed questions and ideas.
- Even if the CAO cannot commence the listening tour far in advance, he or she can ask to have these meetings arranged in advance. So that when day one arrives, as many as three months of upcoming meetings are already scheduled and booked. In fact, given the difficulty of executive scheduling, a CAO who waits to begin scheduling meetings until the first day has already lost weeks or months of momentum.
- The listening tour is as much about reading as listening. CAOs describe using this time to pore over the website, reading every document they can find: strategic plan, the president's speeches, past board meetings, past advancement announcements, team biographies, etc.

- Consider who to meet one-on-one and who to convene for small groups. More senior administrators will expect one-on-one conversations, but small groups are more economical. On one hand, some staff may be less outspoken in groups than individually, unsure about voicing unpopular opinions or discussing their assessment of other teams in the department, but some staff may also feel more comfortable. Small groups also give the CAO the opportunity assess group dynamics.
- Beyond the senior advancement team, CAOs recommend conducting “skip-level check-ins” as far down the organization as they have capacity: meeting with the direct reports of your direct reports, and even one layer down past that if possible.
- For external stakeholders, it is preferable to conduct the meeting in a place they will find comfortable – in their office or in their part of campus. Going to them shows respect. It’s also a way to learn to find your way around campus.
- There will be a great many high-priority stakeholders – especially certain prospects and donors – that you do not have capacity to meet with for at least three months. Aside from their meetings, CAOs should create a substantial list of people to place short calls or send e-mails to, to “hold them over” until they can meet in person.

Getting the Most Out of Your Listening Tour

- It is unlikely that one can effectively prepare for, process, take notes during, and engage in adequate follow-up activities for more than three or four hours of substantive meetings in a single day. Don’t overdo it. Try to space meetings out. Also do not book meetings back-to-back or too close together, such that one running over makes you late for the next one. In many cases, these are critical first impressions that shape the way you are perceived.
- After each major substantive meeting, memorialize the conversation in a notebook or electronically. Note the following:
 - Compile major findings or observations about institutional culture or the advancement division
 - Identify where decisions need to be made soon versus decisions that can be deferred to later.
 - Listen for small things and quick wins that you can fix now.
 - Create a ‘parking lot’ document of big-ticket items that you need to return to and think about more deeply. It is helpful to make a list of problems you learn about (especially long-simmering unaddressed issues) that you have no bandwidth to tackle at this time, but still want to raise to the President so that s/he is aware that they predate you.
- Send a personalized note afterwards to get the ball rolling on any data, information, or subsequent meetings that were discussed. It shows that you were listening carefully.

Internal and External Stakeholders to Meet With During Listening Tour

Supervisory relationships

- President
- Governing and/or foundation board leadership (e.g., chairs as well as chairs-elect or past chairs as appropriate, executive committee members, development committee members)
- Public system leaders or religious order leaders

Cabinet colleagues

- President’s chief of staff or special assistant
- Provost
- Chief financial/business officer

- Chief student affairs officer
- Academic medical center/health sciences executive
- Every dean
- Athletic director
- Chief human resources officer
- Vice president for government affairs
- Vice president for marketing and communications
- Regional/branch campus leaders
- Chief diversity officer
- Vice president for research
- General counsel and compliance officer

Other key internal relationships

- Members of the search committee that selected the CAO
- Immediate predecessor
- Internal incumbents or finalists the CAO was selected over

Advancement team

- Interim CAO
- COO or senior leader for development or senior advancement leaders for each unit, as appropriate
- Leaders for major functional areas, like: annual giving, alumni relations, donor relations/stewardship, prospect research, corporate/foundation relations, advancement services
- Highest-performing advancement staff that leaders fear may be a flight risk because of senior turnover
- Top third of highest-performing major gifts officers
- Longest-serving or most widely-respected members of the advancement team

Key external stakeholders ("call list")

- Community leaders (e.g., chamber of commerce CEO, leaders of major regional nonprofits, leaders of nearby universities, elected officeholders)
- Top prospects and donors
- Top largest living donors in history and to current campaign
- Senior volunteers on major councils and committees (e.g., campaign steering committees, alumni association board, president's leadership council, leaders of college and school advisory boards)
- Notable living alumni who play an active role in the institution or alumni base

Additional Reading and Resources

See the EAB document "*Assessing Institutional Culture and Dynamics*" for ideas on questions to raise in these meetings.