

Building an Effective President–CAO Partnership

Supporting a Successful Leadership Transition

How to Use This Guide

This guide supports early, structured conversations between the president and chief advancement officer (CAO) that align priorities, clarify roles, and establish effective working norms. The sections that follow outline key areas for early alignment, helping ensure that advancement efforts reinforce the president’s vision while enabling early momentum with boards, donors, and external partners.

Use this resource within the first 90 days of a new presidency to support a successful leadership transition and lay the foundation for long-term fundraising success.

1. Establish a Shared Starting Point for Early Decisions

Before the first working session, gather a concise set of materials that establish a shared understanding of advancement performance, priorities, and early decision points.

Early Focus Area	What to Prepare	How EAB Can Support This Discussion
Advancement Landscape & Risks	<ul style="list-style-type: none"> Sector trends, donor sentiment, and institutional constraints to flag early 	State of the sector insights and data review to share with the new president
Advancement Team & Capacity	<ul style="list-style-type: none"> Current staffing by function Notable gaps, vacancies, or pain points 	Benchmarking insight review to evaluate team size and shape
Campaign Status	<ul style="list-style-type: none"> Current campaign goal, progress, and timeline Campaign priorities and differentiators 	Campaign readiness and roadmap review to clarify progress, remaining work, and leadership decision points
External & Corporate Partnerships	<ul style="list-style-type: none"> Current corporate and foundation partners Near-term opportunities requiring senior leadership 	Corporate partnership roadmap review to build a coordinated, outcomes-driven approach to industry partnerships
Fundraising Performance & ROI	<ul style="list-style-type: none"> Fundraising production results Advancement spend trends 	Benchmarking insight review to contextualize performance

Contact research@eab.com or your Strategic Leader to schedule EAB support.

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2. Align on Early Operating Rhythm and Governance

Defining core meetings, governance structures, and coordination practices helps create stability during transition and supports effective decision-making between the president and chief advancement officer. The structures outlined below are intended to provide an initial foundation for collaboration and can be refined over time as working norms and priorities evolve.

Meeting Type	Purpose
Travel & Scheduling Meeting (weekly, delegated to staff)	Manage and approve travel, donor visits, external engagements for the president, consolidate multiple requests, align with institutional priorities
Principal Gift / Major Donor Pipeline Meeting (weekly or biweekly)	Review active prospects/donors that the president is engaged with; discuss moves-management, cultivation/solicitation plan, stewardship, next steps
Advancement Update Meeting (monthly)	Provide overall updates on the advancement division: strategy, staff changes, budget/budget requests, cross-division coordination, upcoming events/initiatives
Board / Governance Preparation (monthly or as needed)	Prepare for board/foundation/alumni-board engagements, review board-level fundraising, donor governance, reporting, stewardship strategy
President / Provost Check-In (quarterly or semi-annually)	Align with the provost on how deans and faculty are supporting advancement; clarify expectations for academic leadership participation in fundraising; coordinate donor engagement tied to academic priorities
Periodic Time Allocation Review (annually)	Review how the president’s time has been allocated to advancement efforts, assess effectiveness, recalibrate time commitments or strategy as needed

Three Ways to Strengthen the President–CAO Operating Rhythm

- Block recurring donor and advancement time on the president’s calendar

- Use consistent briefing templates and agreed upon follow-up timelines

- Document which decisions require presidential approval

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3. Calibrate Internal Strategic Expectations

Since you will be working closely with the president, it's important to develop a shared understanding of strategic and personal preferences to facilitate an effective partnership.

CAO-Driven Discussion

As chief advancement officer, you should be prepared to share your recommendations for advancement-focused strategy questions before the president weighs in.

Strategic Inputs from Advancement

- Risks or constraints that should shape advancement strategy (e.g., donor fatigue, reputational issues, pipeline gaps)
- Insights on where advancement should integrate vs. operate independently across functions (e.g., academics, operations, communications, career services)?
- The role of donors, alumni, and community partners in informing institutional priorities

Questions for President

Open the floor for a wider conversation with the president. This is an opportunity for the president to share their top priorities, concerns, and questions as they begin their tenure.



- What is your vision for the institution over the next 1–3 years? The next 5–10 years?
- Which new priorities do you hope to incorporate into current fundraising efforts?
- Which existing institutional priorities or initiatives will we keep fundraising for?



- Where do you see opportunities for better alignment between your institutional vision and advancement priorities?
- What kinds of institutional or budgetary constraints will need to be factored into advancement strategy?
- What role would you like me and my team to play in board relationships and governance, particularly related to fundraising and external engagement?



- How do you feel you are best deployed: one-on-one meetings, small dinners, large events, speaking engagements, etc.?
- How much time are you willing or able to dedicate to donor visits and travel (weekly or monthly), and how do you expect that to evolve over time?
- What is your perspective on comprehensive campaigns? How open are you to micro and sprint campaigns?

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4. Nail Down the Elevator Pitch Prior to Donor Interactions

Donors are more likely to give when they believe an institution will be a good steward of their investments. The president is well-positioned to instill this confidence early on through an elevator pitch – a concise yet informative speech that clearly articulates their institutional vision.

Crafting a Compelling “Why”

When appropriate, the CAO should weigh in on strategic priorities to help the president construct a relevant elevator pitch. Invite the president to consider these questions:

- What institutional priorities are key for success in the current moment?
- What is your vision for the institution over the next 10 years?
- What key challenges and opportunities do you see ahead for the institution? What actions will you and the institution take to prepare for those?
- What are your campaign goals during this presidency?
- What drew you to this institution?
- How do you want to be remembered at this institution?
- How does your personal or professional background inform your strategic vision?

Translating the “Why” into an Elevator Pitch

Instructions for President: For each question above, write a 3-5 sentence elevator pitch that you would present to a donor. The goal is to build donor trust by laying out a clear vision of what you hope to achieve and how you plan to do it.

Sample Pitch for Question #1: *“I view our institution’s responsiveness to labor market needs as the key to success in this moment. As president, I plan to better align our institution with workforce demands by expanding partnerships with regional companies and strengthening career-readiness initiatives. In doing so, we can enhance the research enterprise, stimulate local economies, and increase graduate employability.”*

Write Your Elevator Pitch: Choose a question from above and draft a pitch.

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5. Support Early Engagement with Key Donors and Prospects

Early donor engagement is a critical opportunity for a new president to build confidence among key donors and prospects, communicate commitment to the institution’s mission, and begin establishing personal credibility during transition.

In these early interactions, the president should focus on listening, learning, and reinforcing shared purpose, while the chief advancement officer coordinates, prepares, and participates in meetings to ensure engagement is focused and well-sequenced.

To balance competing demands, early donor outreach should be intentional and limited, with the president and CAO aligned on a manageable number of meetings, appropriate engagement formats, and protected time on the president’s calendar.

Role of the CAO/Advancement	Role of the President
Identify and prioritize a limited set of key donors and prospects for early engagement	Lead early donor conversations with a listening-first, relationship-focused approach
Coordinate outreach, sequencing, and pacing of donor meetings	Reinforce confidence in the institution’s mission, leadership, and direction
Prepare briefing materials and talking points tailored to each engagement	Communicate appreciation for past support and ongoing stewardship
Attend meetings as appropriate to support continuity and ensure follow-up	Avoid signaling specific fundraising priorities or campaign commitments prematurely
Capture insights, track follow-up actions, and integrate learnings into advancement strategy	Model openness and accessibility to donors during transition

Three Ways to Maximize President-Donor Interactions:

VIP Donor Day

Every month, set aside a full day for donor visits with the president

Dinner with the President

Small group dinner with the president and 5-10 top donors and prospects

Weekly Donor Meetings

Shorter, but more frequent meetings with donors (e.g., three hours a week)