Team Synergy: The President and Chief Advancement Officer

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Peter W. Teague, EdD, President
Lancaster Bible College
PTeague@LBC.edu

I. Introduction

II. The president’s fundamental roles in the advancement process:

1. Visionary
2. Change-agent
3. Exemplar
4. Coach
5. Connector
6. Spokesperson

In essence, the president personifies the character of the institution he leads.

III. President’s leadership role in the advancement program:

1. Provides resources to build and sustain an effective advancement office
2. Gets appropriately involved in the advancement process
3. Understands that acquiring resources for the institution is a critical part of the president’s job and other key employees in the institution

...the advancement process requires a major time commitment from the president to ensure that relationships and resources are developed for the long term.

IV. President and chief advancement officer team relationship

1. President must expect strong leadership, written development plan, accountability system from advancement staff members
2. President should receive weekly reports on calls made and follow-through
3. President should expect to focus one-third of his time off-campus
4. President must engage in external community relations in order to identify and cultivate major prospects

5. President should expect to receive a briefing prior to a call and to present a report following a call

*Fundraising is a team effort and the relationship between the chief advancement officer and the president is so very important.*

V. President should expect the chief advancement officer will...

1. Operate from a personal and professional commitment to advancement as ministry

2. Think and plan strategically

3. Use the president and board of trustees strategically

4. Facilitate advancement education for the president

5. Be a reliable and loyal partner

VI. Chief advancement officer should expect the president will...

1. Lead according to a personal theology of stewardship and advancement

2. Advocate for the advancement department within the broader organization

3. Be willing to learn from the chief advancement officer and be used strategically in advancement work

4. Trust the chief advancement officer

VII. Expectations of each other

1. Deep spiritual maturity/integrity

2. Competence in skills and reliability in work

3. Ownership of advancement goals
4. Agreement and communication of job expectations  
5. Set policies and budgets  
6. Develop reporting, measurement, and accountability tools  
7. When troubles arise, revisit expectations  
8. Adjust expectations to meet strategic goals  

VIII. Creating team synergy  

1. The most important relationship within the institution is the relationship you develop with your chief advancement officer  
2. Twin criteria for a chief advancement officer  
   a. Track record  
   b. Chemistry  
3. Place chief advancement officers in the right geographical place  
4. Recognize the chief advancement officer as part of your chief advisory group  
5. Make the advancement professional an educator  
6. Include chief advancement officer in all substantive discussions about the institution and its affairs  
7. Invest a great measure of presidential trust and confidence in the chief advancement officer  

This is perhaps the main reason you must have an extraordinary relationship with this individual. He must have such a well-integrated and healthy personality that there is little or no discomfort in identifying with you.