



Tony McClellan *Leading Ideas* on

The Chief Development Officer Search: Seven Questions You Should Ask Before The Handshake

Tony McClellan, an associate with The Education Group, has eighteen years of independent school development experience.

There are several very important points that should be clarified as you pursue your first, or a new, position as chief development officer at one of our independent schools. Inconsequential things such as salary, benefits, where you will live, can your children attend the school tuition free, and will your office have a window will be foremost on your mind, and that is quite understandable. But there are some other important issues you will want to talk about that will have a long-term impact on your success at your next position and on your career.

To whom will I report? The Chief Development Officer (CDO) should report directly to the Head of School. Period. Reporting through the chair of the trustee development committee or even the board president is not appropriate. The CDO is one of the most important appointments the Head makes, and they should be “attached at the hip” in order to have a strong and effective working relationship.

Is there an administrative council or cabinet, and if so will I be a member? Most Heads convene the administrative team on a regular basis. It is important that the CDO is part of that group in order to understand all the facets of the school and all that is going on so s/he can represent the school to its constituencies effectively. Likewise it is important that the other administrators understand and appreciate what the advancement program is about.....and why the head is flying around to all the country’s garden spots all the time!

Will I attend meetings of the Board of Trustees? Only under the most extenuating circumstances should the CDO be excluded from attendance at all Board meetings, and in such a rare case the prospective CDO and the Head should commit to do what is necessary to bring that about. The second closest working relationship the CDO will have is with the Board collectively and with trustees individually. It is important that the CDO know “what is going on” in order to advance the school’s position with prospective donors. If the trustees can’t trust the CDO to handle sensitive information



appropriately then they need to review what it is they are looking for in a development program.

One way to “skin this cat” is to offer to be the staff support person to the Board. Most Heads will welcome that offer with open arms! This enables the CDO to build relationships with trustees on an on-going basis. As part of the assignment, the CDO should also staff the development committee, the committee on trustees (or nominating committee) and any *ad hoc* committee such as a centennial committee or campaign steering committee.

What kind of budget commitment is the school making to, or willing to make to, the advancement program? What about staffing? Often schools look for a *wunderkind* who can do it all thus saving the budget. Anyone who has even the remotest appreciation of what makes an affective long-term advancement program knows the folly in this thinking. Expectations on both sides should be very clear on this point. Will you, as CDO, have the resources to accomplish the challenges that are being presented. If you have doubts about this, negotiate an agreement in principle to provide adequate resources and get it in writing. We know school budgets are tight, and it will take time, but at least get a commitment.

When was the last audit completed? Was the development program included in that audit? If not, can you get at least a review by the auditors? You do not want to be held responsible for a predecessor’s sloppy record keeping. Here is but one example we have encountered. The School had a totally volunteer-directed capital campaign that resulted in \$600,000 in pledges. Their first CDO arrived to discover the minimal records available showed that about \$400,000 had been collected. No pledge fulfillment program was in place. The Board was proceeding on the belief that they had \$600,000 to spend. The balance of the money never came in, and the new CDO “inherited” a significant problem not of his making.

Is there a capital campaign in your future? How did the school determine that a capital campaign was appropriate? How were the purposes determined? Has the Board developed a strategic plan? If not, they should agree to do so utilizing an outside facilitator. Likewise, will the Board agree to a feasibility study prior to launching a campaign? Don’t start a campaign without one!

Will I have an annual evaluation? Formal, systematic evaluations are becoming the norm in our independent schools, but often the criteria utilized in these evaluation



programs are not appropriate to advancement officers. The CDO should be evaluated by the Head, and only by the Head. Bottom-line oriented trustees who are prone to equate only the dollars raised with good performance should not be part of this process. We have never encountered a “director of fundraising”; advancement/development entails a process, and by the very term “development” is defined as a total program of friendraising as well as fundraising.

Now, find me a CDO who professes to work in such a perfect world, and I will introduce you to my cousin who has a bridge for sale. But if you are going to work in a less than perfect world, you should at least know and understand all the ground rules going in.

These seven questions should be part of your interview of the hiring Head and of the Board. Once you have all the information you need, you can make an informed career decision knowing what is expected of you, and what you can expect from your new Head and your new Board. And your new School will know they are getting a true professional.

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