



EXECUTIVE DIRECTOR OF GIFT PLANNING

STONY BROOK UNIVERSITY

Stony Brook, New York



Stony Brook University

The Aspen Leadership Group is proud to partner with Stony Brook University in the search for an Executive Director of Gift Planning.

The Executive Director of Gift Planning will lead the development of a comprehensive gift planning program at Stony Brook University, working closely with donors, volunteers, development officers, and other personnel to increase deferred and blended giving through effective gift planning. The Executive Director will be responsible for the Gift Planning operating budget, and will interface with high-level campus officials, University donors, as well as students and members of the community. The Executive Director will represent University Advancement with utmost professionalism at all times. The Executive Director will develop plans for projects and programs that involve coordination with other departments and outside organizations, and will establish strategic fundraising goals and report on results.

Stony Brook University, widely regarded as a SUNY flagship, was established in 1957 as a college for the preparation of secondary school teachers of mathematics and science. The first campus was in Oyster Bay, Long Island, on the grounds of a former Gold Coast estate. In 1962, a new campus was built near the historic village of Stony Brook on land donated by local philanthropist Ward Melville.

Stony Brook University currently provides comprehensive undergraduate, graduate, and professional education of the highest quality while carrying out research and intellectual endeavors of the highest international standards that advance knowledge and have immediate or long-range practical significance. The University provides leadership for economic growth, technology, and culture for neighboring communities and the wider geographic region including state-of-the-art innovative health care, while serving as a resource to a regional healthcare network and the traditionally underserved.

Part of the State University of New York system, the University has grown tremendously and is now recognized as one of the nation's important centers of learning and scholarship — carrying out the mandate given by the State Board of Regents in 1960 to become a university that would “stand with the finest in the country.” *USA Today* ranked Stony Brook the [ninth most diverse](#) institution in the nation with a student population that identifies as 23.8% Asian, 10.3% Black or African American, 9.9% Hispanic or Latino, and 0.3% American Indian or Alaskan Native. Stony Brook ranked #17 among educational institutions in *Forbes'* list [America's 500 Best Employers for Diversity 2021](#).

REPORTING RELATIONSHIPS

The Executive Director of Gift Planning will report to the Senior Associate Vice President for Advancement.

STONY BROOK UNIVERSITY'S COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION

Having a more diverse community of students, faculty, and staff directly connects to Stony Brook University's mission, which states that it must strive to fulfill its objectives of high-quality comprehensive education at all levels while providing leadership in economic growth and state-of-the-art healthcare for the region, and do so in the context of celebrating diversity and positioning the University in the global community. Ensuring a broad definition of diversity further deepens that connection to the mission. Accordingly, the [Stony Brook University's Plan for Equity, Inclusion, and Diversity](#) includes diversity of race, ethnicity, religion, age, ability, veteran status, socioeconomic status, gender identity and expression, sex and sexual orientation. Diversity of perspectives, thought, and understanding serve as a foundation of Stony Brook's educational enterprise and helps its students become citizens of the world. Focused efforts must be made to recruit and retain a more diverse faculty group across the disciplines. Similar effort is needed to recruit and retain a more diverse professional staff and student body.

As noted in the 2015 SUNY Diversity, Equity, and Inclusion Policy, "SUNY aspires to be the most inclusive State university system in the country. We will achieve this goal by striving to ensure that the student population we serve and the administrative staff and faculty we employ are representative of the diversity of our state. SUNY will identify diversity, equity, and inclusion as essential aspects of system and campus planning and as indispensable characteristics of academic excellence and the ongoing experience of every member of the SUNY community."

Stony Brook embraces this definition of excellence, and this plan, along with ongoing work, will bring the community closer to actualizing these aspirations.

PRIMARY RESPONSIBILITIES

Fundraising Leadership

The Executive Director of Gift Planning will

- in collaboration with the Senior Associate Vice President for Advancement and other members of the Advancement Leadership Team, direct all aspects of the Gift Planning team, with special emphasis on soliciting and closing major (>\$100,000) and principal (>\$1,000,000) deferred and blended gifts. This includes working directly with donors and their advisors and managing a portfolio of donors and prospective donors, as well as those prospects that may be transferred into the portfolio as a result of the complexity of a gift or pending solicitation;
- work directly with other development personnel to develop and implement gift planning strategies that maximize deferred and blended gift potential; and
- assist development officers with cultivation and solicitation strategies, as well as with solicitation techniques, proposal and fund agreement preparation, negotiation, and closure of such gifts including coordinating a comprehensive, ongoing gift planning training program for the benefit of all development staff and key University administrators (and volunteers, where appropriate), including the utilization of external resources and trainers.

Marketing

The Executive Director of Gift Planning will

- collaborate with Advancement Marketing and Communications, Advancement Strategy, and vendors to develop and implement a comprehensive marketing strategy (including web, print, and direct mail) to promote gift planning opportunities among targeted market segments and generate leads.

Staff and Budget Management

The Executive Director of Gift Planning will

- supervise 1-2 team members and provide guidance and support necessary for their professional success and development; and
- develop an annual budget in collaboration with the Senior Associate Vice President for Advancement.

Stewardship and Events

The Executive Director of Gift Planning will

- work closely with staff and donors in Donor Relations & Stewardship and Advancement Events to reinvigorate a donor recognition society for donors with deferred gift history or intentions; and
- plan meetings, webinars, receptions, and other events for the purpose of cultivating relationships with and soliciting gifts from targeted groups across campus, including but not limited to grateful patients, retired and emeriti faculty and staff, Staller Center audience groups, etc.

Gift Administration

The Executive Director of Gift Planning will

- create and maintain appropriate documentation associated with gift planning/deferred giving, including recommendations regarding applicable policies and procedures; and
- act as liaison with Foundation Counsel regarding legal issues associated with complex gifts and help to staff Stony Brook Foundation's Gift Review and Acceptance Committee.

LEADERSHIP AND KEY COLLEAGUES

Justin Fincher, PhD

Vice President for Advancement

Justin Fincher, PhD, serves as the Vice President for Advancement at Stony Brook University and Executive Director of the Stony Brook Foundation. Reporting directly to Stony Brook University President Maurie McInnis and serving as a member of her senior management team, Fincher provides leadership for the University's development and alumni relations operations.

Prior to joining Stony Brook in August 2021, Fincher was the Vice President for Advancement Strategy and Administration at The Ohio State University. He oversaw advancement's talent management, training, and human resources functions, as well as the organization's strategic planning and internal communications efforts. Fincher managed projects that spanned the entire organization, advised the Senior Vice President on policy and short- and long-range planning, and aligned resources and talent to advance the organization's strategic priorities.

Prior to Ohio State, Fincher held roles at Rutgers University and Johns Hopkins University where he led teams responsible for assessment and research, marketing and communications, talent management, and constituent engagement. A nationally published author, teacher, and scholar of leadership development, he studies the influences of mentorship, involvement, diversity, and organizational climate on one's sense of belonging and capacity for leadership.

He completed his master's degree in college student personnel and his doctorate in higher education administration at the University of Maryland-College Park. He holds a bachelor's degree in biology, with a focus on human behavior, from Rutgers University.

A.J. Nagaraj

Assistant Vice President for Advancement Strategy

A.J. Nagaraj is the Assistant Vice President for Advancement Strategy at Stony Brook University, where he leads cross-team strategy and innovation-related projects focused on leveraging national best practices along with data and analytics to enhance divisional effectiveness.

Prior to joining Stony Brook, Nagaraj served as Senior Consultant and Director with EAB, where he managed an advancement investment and performance benchmarking initiative for 10 private research universities, conducted best practice research on fundraiser performance management, and later launched the firm's first programs in the independent school and K-12 public school district areas. Before joining EAB, he worked in human capital strategy roles at the District of Columbia Public Schools and the Teach for America national office in New York City.

Nagaraj holds a masters of education from the Harvard Graduate School of Education, where he focused on education leadership and policy analysis, and a bachelor's degree in political science from the University of Southern California.

PREFERRED COMPETENCIES AND QUALIFICATIONS

Stony Brook University seeks an Executive Director of Gift Planning with

- a commitment to the mission of Stony Brook University – to provide comprehensive undergraduate, graduate, and professional education of the highest quality;
- an understanding of higher education, especially at large teaching and research institutions or other complex organizations;
- expertise in gift planning techniques;
- experience developing planned gift proposals;
- knowledge of financial, tax, accounting, and investment terminology;
- knowledge of investment concepts and the investment of deferred gifts
- experience working with financial advisors in developing philanthropic plans;
- an understanding of the law of nonprofit organizations and general estate, gift, and income tax law;
- exceptional verbal and written communication skills;
- experience collaborating with internal and external stakeholders;
- an ability to produce results against established metrics;
- an ability to develop a budget as well as analyze, interpret, and discuss complex financial information;
- an entrepreneurial spirit;
- an ability to collaborate effectively with faculty, staff, and outside constituencies;
- an ability to be flexible and seize opportunities as they develop; and
- experience working with donor/alumni databases including Raiser's Edge, PG Calc, or similar software, as well as MS Word, Excel, Outlook, and PowerPoint.

A bachelor's degree is required for this position as is at least seven years of gift planning experience combined with a proven track record of success in soliciting and closing major and principal deferred and

blended gifts with significant institutional impact. Stony Brook University welcomes candidates with a JD or an equivalent degree or legal training.

SALARY AND BENEFITS

Stony Brook University offers a competitive salary and [benefits package](#).

LOCATION

This position is located in Stony Brook, New York. Stony Brook is a hamlet and census-designated place in the Town of Brookhaven in Suffolk County, New York, on the North Shore of Long Island. Stony Brook began in the colonial era as an agricultural enclave, and experienced growth first as a resort town and then to its current state as one of Long Island's major tourist towns and centers of education. In addition to Stony Brook University, the hamlet is also home to the Long Island Museum of American Art, History, and Carriages and the Stony Brook Village Center, a commercial center planned in the style of a traditional New England village. Stony Brook offers plenty of opportunities for recreational activities like fishing, diving, boating, and other water sports, as well as arts and cultural activities, including art openings and independent films. The entire hamlet is within the Three Village Central School District, a highly regarded system that is a prime attraction for families with school-age children.

Stony Brook University's campus is just miles from the renowned sailing waters of Long Island Sound and near the world-famous Atlantic Ocean beaches on Long Island's South Shore, the Hamptons, and Fire Island, the quaint towns of Long Island's North Shore, and the numerous wineries on the island's East End. Stony Brook also is easily accessible to New York City and its world-famous museums, professional sporting and concert events, Broadway shows, and restaurants of every cuisine via an easy commute by car or mass transit. Similarly, Stony Brook is accessible via mass transit or car to the entire New York/New Jersey/Connecticut tristate area.

APPLICATION INSTRUCTIONS

All applications must be accompanied by a cover letter and résumé. ***Cover letters should be responsive to the mission of Stony Brook University as well as the responsibilities and qualifications presented in the prospectus.*** Review of applications will begin immediately and continue until the successful candidate has been selected.

To apply for this position, visit:

[Executive Director of Gift Planning, Stony Brook University.](#)

To nominate a candidate, please contact Gregory Leet, gregoryleet@aspenleadershipgroup.com or Jeanette Rivera-Watts, jeanetterw@aspenleadershipgroup.com.

All inquiries will be held in confidence.