



SENIOR DIRECTOR OF MAJOR GIFTS AND PLANNED GIVING
TRINITY UNIVERSITY
San Antonio, Texas
[Trinity University](https://www.trinity.edu)



The Aspen Leadership Group is proud to partner with Trinity University in the search for a Senior Director of Major Gifts and Planned Giving.

The Senior Director of Major Gifts and Planned Giving will maximize and leverage the philanthropic potential of Trinity University in order to advance the university's most critical projects and activities. The Senior Director will lead, direct, and guide a highly-functioning team in the identification, qualification, cultivation, solicitation, closing, and stewardship major and planned gifts.

For 150 years, Trinity University has transformed challenge into boundless opportunity. Its resilience, commitment to enterprise, and creative vision has driven it in unwavering pursuit of excellence. The university has seized every chance to redefine the liberal arts for centuries past and present, cultivating a community of lifelong learners driven by a sense of duty to themselves and to the world. Trinity is redefining the liberal arts experience for the 21st century by preparing its students to thrive in a world that values critical thinking, incisive decision making, and extraordinary communication skills.

Trinity University is one of the nation's top private undergraduate institutions. The university has more than 250 full-time faculty members, 97 percent of whom hold doctoral or terminal degrees. With 2,480 talented undergraduate students, the university is known for its stimulating, resourceful, and collaborative environment—in the classroom, on campus, and around the world. Trinity University is proud of its high racial diversity—45% percent of students are minorities or students of color.

U.S. News & World Report cited Trinity as the "best in the West" for its commitment to undergraduate teaching and research; *The Wall Street Journal* ranked Trinity as the #41 best liberal arts college in the nation, factoring in performance indicators such as graduation rates, job placement, and campus diversity; *MONEY.com* ranked Trinity second among the best colleges in the nation for merit aid citing its wide range of renewable merit-based scholarships for incoming first-year students; and *College Consensus* ranked Trinity #49 in the nation among its top ranked colleges and universities. *College Consensus* also ranked Trinity #33 in its list of the top 50 most supportive alumni networks.

REPORTING RELATIONSHIPS

The Senior Director of Major Gifts and Planned Giving will report to the Assistant Vice President Alumni Relations and Development, Joannah Pickett. The Senior Director will manage seven to ten direct reports as well as indirectly manage one to seven additional staff.

PRINCIPAL OPPORTUNITIES

Launched in June 2018, the Time to Lead Campaign for Trinity University is the most ambitious fundraising effort in the university's history: a \$300 million comprehensive fundraising campaign to transform the student experience, the campus, and liberal arts education. Thanks to the generous support of more than 10,000 friends, Trinity University has reached 17% of the total during the first 18 months of the quiet phase of the campaign. Its supporters have created a powerful community that is driving momentum and will propel fundraising efforts through the projected campaign conclusion in 2025. This incredible energy will have an enduring impact on the campus and the world.

University Alumni Relations & Development division seeks a mission-driven, seasoned, and results-oriented fundraising leader to serve as the Senior Director of Major Gifts and Planned Giving for our pan campus fundraising efforts. In partnership with the Vice President and Assistant Vice President, the Senior Director will serve in a vital management and leadership role for the Major and Planned Giving teams. The successful candidate will lead donor strategy for major and planned gifts, as well as manage and mentor a small, enthusiastic development team focused on fundraising, pipeline development, donor relations, and communications that are foundational to the team's success. The Senior Director will partner with world class faculty, leadership thought partners and incredible alumni on high-profile initiatives that through philanthropic investment can transform our world.

In addition to providing management and programmatic oversight, the Senior Director will play a leadership role in ensuring Major and Planned Giving team builds continued momentum toward reaching and exceeding their campaign and planned giving campaign goals as part of the Our Time to Lead: The Campaign for Trinity University. The Senior Director will collaboratively develop, manage, and implement a strategic and operating plan for securing gifts of \$25K or more and planned gifts that will provide organizational growth and long-term philanthropic sustainability. The successful candidate will be a high-performing, creative fundraiser who brings a passion for donor-centric philanthropy, a background in fundraising metrics and KPIs, strong development experience in complex and highly collaborative environments, and a management style that inspires success, supports team members' professional growth, and models integrity, inclusivity, and accountability.

Trinity University is at a unique moment in its 150 year history as it positions itself to take a leading role as a top national liberal arts college, leaning on the impressive faculty talent, increasing and growth in admissions and student academic acumen amidst a beautiful campus. 2019-2020 has been an incredible fundraising year for all goals and indicators and the future is bright for our fundraising and campaign efforts. The new Senior Director joining our team will make a significant impact on the campus and our trajectory, making Trinity University a top brand in higher education.

– Joannah Pickett, Assistant Vice President Alumni Relations and Development

PRIMARY RESPONSIBILITIES

The Senior Director of Major Gifts and Planned Giving will

- lead, direct, and guide the department in identifying, qualifying, cultivating, soliciting, closing, and stewarding major and planned gifts;
- maintain a personal portfolio of major gift prospects;
- provide support for campaign fundraising activities as well as work with volunteer committees and individual alumni volunteers;
- work collaboratively with other members of the advancement division and the senior leadership team to meet objectives and strengthen relations of the university;
- provide support and reports to the Board of Trustees;
- provide counsel and advice to principal gifts team;
- develop and manage immediate and long term plan for stewardship of prospects and benefactors;
- oversee the marketing and promotion of planned gifts through a variety of channels including direct mail, advertising, personal contacts, and local allied professionals;
- oversee the monitoring of the performance of planned giving promotion channels;
- cooperate and collaborate with other employees in the spirit of teamwork and collegiality;
- oversee the development of an annual operating plan and monitor progress towards goals;
- support and monitor the fulfillment of 12-month metrics for major gifts and planned giving;
- manage relationships with prospects in portfolio to move them through the cycle from identification to stewardship;
- staff the President and Vice President as needed;
- build relationships with faculty in support of fundraising priorities and opportunities; and
- monitor departmental budget to ensure expenses are appropriate and within existing parameters.

UNIVERSITY LEADERSHIP



Danny J. Anderson
President

Danny J. Anderson is President of Trinity University, located in San Antonio, Texas. Trinity's academic and co-curricular environment is consistently ranked among the best colleges in the nation (*U.S. News & World Report*) and its faculty is recognized for its strong commitment to undergraduate teaching and scholarship (*Wall Street Journal*). Trinity's curriculum blends the liberal arts and sciences with business and pre-professional programs, enriching students' writing, speaking, and problem-solving skills. The university equips its 2,400 students through experiential learning, undergraduate research, and international engagement, arming them to be global stewards for change. Anderson's vision for Trinity includes ensuring that the university is

recognized as the model of 21st century liberal arts and sciences education.

Anderson became Trinity's 19th president in May 2015, after serving as a faculty member, administrator, and dean at the University of Kansas. A native Texan, Anderson began his academic career in 1985 at the University of Texas at Austin. He received a bachelor of arts in Spanish from Austin College (Sherman, Texas), and a master's and doctorate in Spanish at the University of Kansas. He joined the Kansas faculty in 1988 as an assistant professor in Spanish and was named a full professor in 2003. An award-winning

teacher, he received the ING Award for Teaching Excellence; a W.T. Kemper Fellowship for Teaching Excellence; and a National Endowment for the Humanities Fellowship for University Teachers.

A specialist in Mexican literature and cultural studies, his research examines the history of literary publishing houses and the social history of literary reading in Mexico. He has published two books and more than 20 scholarly articles.

An engaged community and higher education leader, Anderson serves on the Board of Directors of the Independent Colleges and Universities of Texas (ICUT), the Association of Presbyterian Colleges and Universities, the World Affairs Council of San Antonio, the P16-Plus Council of Greater Bexar County, and the United Way of San Antonio. He is a member of the Council on Foreign Relations Higher Education Working Group, the San Antonio Chamber of Commerce, and the Hispanic Chamber of Commerce.

KEY COLLEAGUES



Michael Bacon '89, CFRE

Vice President for Alumni Relations & Development

Michael Bacon returned to Trinity after 25 years of experience as a senior-level development and external relations executive, where he specialized in the creation and implementation of strategic fundraising programs that included capital campaigns, annual giving, and major gifts. At Trinity, Bacon provides leadership and strategic vision to the university's fundraising and overall alumni engagement.

Bacon founded the firm Bacon Lee & Associates in 2000 with Marion Lee '78. As fundraising consultants, the pair offered knowledge in board training, fund development, and long-term planning to nonprofit organizations in San Antonio and the Central Texas area. Bacon began his fund development career as the Assistant Director of the Annual Fund at Kenyon College in Gambier, Ohio, after graduating from the McCombs School of Business at the University of Texas at Austin. A certified fundraising executive, Bacon has served as Director of Development for the San Antonio Academy and the first Grants Manager for the Kronkosky Charitable Foundation.



Deneese Jones, Ph.D.

Vice President for Academic Affairs

Deneese Jones, Ph.D., serves as the university's Chief Academic Officer and oversees all academic programs, the development and mentoring of faculty, and implementation of the university's strategic plan *Trinity Tomorrow and the Pathways* curriculum. Previously the Provost at Drake University, Jones has had an extensive, 25-year career in academia as an administrator and professor. She has published articles in scholarly journals as well as books related to her research interests in equity pedagogy in literacy instruction, teacher education and multicultural education, and leadership development.

A native Texan, Jones received her bachelor of science from Texas Woman's University, her master's and doctorate from Texas A&M University, College Station.



Joanna Pickett

Assistant Vice President Alumni Relations and Development

Pickett joined the Trinity family in August 2018 with more than 20 years of higher education experience, most recently with fifteen years at Georgetown University, where she served as the Assistant Vice President of Annual Giving, leading strategy for direct response marketing activities as well as strategy and design of giving societies for leadership and loyalty giving. Pickett also brings significant experience partnering with volunteers, managing projects, developing programs, designing creative marketing campaigns, and managing and forecasting budgets. Prior to her previous role, Pickett served as the Senior Director of Board Operations and Alumni Services, where she served as the Chief of Staff for the alumni association's governing body and directed the annual strategies, long range planning, and implementation of committees.

Pickett holds a bachelor of arts in Comparative Sociology and Social Services from the University of Puget Sound. She also earned her certification in Nonprofit Leadership and Management from the Georgetown University McCourt School of Public Policy.



James Holzbach

Senior Director of Advancement Services

Jim Holzbach has over 15 years professional experience and proven success in delivering executive analysis and senior-team level solutions on advancement operational issues within higher education advancement settings. He earned his Juris Doctorate from Case Western Reserve University and received his Bachelor of Arts in History/Political Science from Oberlin College. Holzbach has experience with numerous CRMs and currently spearheads the committee analyzing and auditioning vendors for Trinity's digital transformation process. He is an accomplished writer and has published; *Aim High!*, APRA Connections, Summer 2008 as well as *Awaken the Power Within Your Database*, APRA Connections, Spring 2002.



Kristine Howland

Director of Planned Giving

During Kris Howland's 33 years in higher-education fundraising, her work has been primarily in small shops where she wore many hats and worked in all areas of fundraising. With responsibilities for major and capital gifts in four campaigns at four colleges (one public and three private), her professional interests led to a focus on major and planned gifts.

Howland is currently serving as President of the Planned Giving Council of San Antonio Board and has been a regular member of the National Association of Charitable Gift Planners and its predecessor since 1995 and the Association of Fundraising Professionals since 1989. Currently director of planned giving at Trinity University (San Antonio, TX), she earned a bachelor's degree from Cornell University (NY) and an MBA from Plymouth State College (NH).



Katie Carpenter
Director of Principal Gifts

Katie Carpenter began work at Trinity University in 2016 as director of foundation relations. In 2019, she became Director of Principal Gifts and works to support the President, Vice President, and Assistant Vice President in cultivating, soliciting, and stewardship the university's highest level of donors.

Prior to moving to San Antonio, Carpenter worked for nearly 10 years at Rice University in Houston, first in donor stewardship, developing creative and meaningful ways for the university to maintain close relationships with its donors. Later, as Director of Foundation Relations Officer, Carpenter worked closely with major funders to boost Rice's giving from private foundations.

Carpenter received her bachelor's degree from Texas A&M University and her master's degree from Rice University.

PREFERRED QUALIFICATIONS

Trinity University seeks a Senior Director of Major Gifts and Planned Giving with

- prior administrative and leadership experience in a large complex higher-education environment, including evidence of vision and effective strategic planning and implementation;
- integrity and strong interpersonal skills with a demonstrated ability to work well with people at all levels of an organization, across a diverse range of educational and social backgrounds, and to convey genuine respect for every individual;
- experience working with board members and volunteers and ensuring that they are meaningfully engaged;
- a demonstrated ability to establish and maintain relationships with high level prospects and alumni;
- the ability to manage complex relationships including proven collaboration and teamwork skills;
- proven management skills and experience fostering a collaborative, positive, goal-oriented environment that empowers staff and enables them to excel in their roles;
- experience working with other leaders in a productive, collaborative, and collegial manner;
- personal success cultivating, soliciting, and stewarding major and institutional donors at the five-, six-, and seven-figure levels;
- an interest in and commitment to diversity, equity, and inclusion both within University Alumni Relations & Development and externally;
- the ability to inspire high-net-worth individuals, corporations, and foundations to philanthropic leadership;
- experience with multi-million dollar campaigns;
- an exceptional ability to communicate, both in writing and in speaking;
- an ability to work independently and as part of a team environment;
- an ability to plan strategically, set priorities, and efficiently manage resources;
- strong project-management skills and organizational abilities;
- demonstrated analytical and strategic thinking capabilities; and
- high ethical standards and commitment to the mission of Trinity University.

A bachelor's degree is required for this position. At least seven years of senior experience in major gifts, campaign execution, preferably in a higher education setting is preferred. An advanced degree is a plus.

DIVERSITY, EQUITY, AND INCLUSION

Respect. Engagement. Equity. Inclusion. Understanding. Trinity University uses these five words not only to define diversity, but also community. It believes that community cannot exist without diversity and that diversity cannot be fruitful without a vibrant community.

Trinity is a place where faculty, staff, and students value the interplay between community and diversity. Through conversation about ethnicity/race, socio-economic class, gender, religion, sexual orientation, body size, nationality, age and ability, this community recognizes that by expanding minds, it allows for dialogue, discussion, and growth. As a result of the diversity in its community, Trinity University seeks to move beyond raising awareness to create sustainable campus change and inclusion across difference.

Trinity University's Diversity and Inclusion Office (DIO) provides programs and services that enhance the retention, persistence, academic and career success of underrepresented and historically marginalized student populations. It does this by educating the campus community on topics of diversity and social justice, engaging students in critical thought about privilege and oppression, and by empowering students to become change agents in their own community and the greater world.

SALARY & BENEFITS

Trinity University offers a competitive salary and an excellent [employee benefits package](#). These benefits are a valuable part of the total compensation provided to its employees.

LOCATION

Trinity University's campus is a stone's throw from the heart of downtown San Antonio, which allows the Trinity community to experience everything from art events like First Friday to Fiesta celebrations to farmer's markets at the Pearl. Aside from the downtown areas, San Antonio is home to many teams, attractions, and events. Professional sports teams such as the five-time NBA champion Spurs, the Missions (a Double-A affiliate of the San Diego Padres), the NASL Scorpions, and the WNBA Stars, and events like the San Antonio Stock Show & Rodeo and Fiesta bring millions of people to the city to celebrate local culture.

With an ethnically and racially diverse population (74% of the city's residents are people of color), San Antonio is one of the fastest growing cities in America with a booming economy thanks to a demand for medical, biomedical and biotechnology, energy, manufacturing, tourism, technology, and military sectors. San Antonio's close proximity to Mexico adds both to its economy and engagement with the world.

APPLICATION INSTRUCTIONS

All applications must be accompanied by a cover letter and résumé. **Cover letters should be responsive to the mission of Trinity University.** Review of applications will begin immediately and will continue until the successful candidate has been selected.

To apply for this position, visit:

[Senior Director of Major Gifts and Planned Giving, Trinity University.](#)

To nominate a candidate, please contact Angelique Grant:

angelique@aspenleadershipgroup.com.

All inquiries will be held in confidence