



SENIOR DIRECTOR OF DEVELOPMENT, GIFT PLANNING

[MIAMI UNIVERSITY](#)

Oxford, Ohio



The Aspen Leadership Group is proud to partner with Miami University in the search for a senior director of development, gift planning.

The senior director of development, gift planning will help advance the mission of Miami University by serving as a key leader in the charitable gift and estate planning program. The senior director will assist in planning, organizing, and implementing strategies that increase the level of personal involvement and financial commitment of donors and prospects of Miami University. In addition, the senior director will have a set of metrics corresponding to strategies seeking philanthropic and volunteer support of alumni and friends of Miami.

Miami University, established in 1809, is ranked among the top 50 national public universities by *U.S. News & World Report*. As an original Public Ivy, Miami provides Ivy League-quality education at a public school price with an exceptional return on investment. Miami is a place where ambitious students find their purpose and prepare for a lifetime of success. Miami has over 200,000 alumni and 20,000 enrolled students. These students major in over 120 different fields of study.

For 10 years in a row, *U.S. News & World Report* has ranked Miami among the top 10 public universities nationally for strong commitment to undergraduate teaching. Miami's four-year graduation rate is 21st in the nation among public colleges and universities, first among publics in Ohio. Students from racially and ethnically underrepresented backgrounds graduate from Miami at a rate that is 31.8 percentage points higher than the national average for underrepresented students. Miami's first-to-second-year student retention rate of 89% is well above the national average of 67%.

With its close proximity to the city of Cincinnati coupled with a nationally recognized excellence in undergraduate education there is a significant opportunity to increase all measures of support from alumni, friends, and corporate and foundation partners. As the university looks to embark upon its next comprehensive campaign, a robust and high functioning development team will play a critical role in the success of that effort.

REPORTING RELATIONSHIPS

The senior director of development, gift planning will report to the assistant vice president for gift planning, Jayne Whitehead.

FROM THE VICE PRESIDENT AND SENIOR ASSOCIATE VICE PRESIDENT

The Senior Director of Development for Gift Planning will have the opportunity to play a pivotal role in helping to increase fundraising support and planned gifts for Miami's upcoming public campaign. This eleven year initiative which began in 2016 is scheduled for its public launch in the next year and has a proposed goal to raise \$1 billion.

One of the original Public Ivies, Miami University sits nestled in idyllic Oxford, Ohio, and is widely considered one of the most beautiful college campuses in the country. Miami is consistently ranked by US News and World Report as one of the Top three institutions for undergraduate teaching and many of its academic programs are among the top public programs nationally.

The Division of University Advancement is fully integrated at Miami, with all of the Office of Development staff reporting centrally. The Gift Planning team is one of eleven teams spread across the department and when fully staffed is a group of six advancement professionals. Planned gifts have routinely accounted for nearly 50% of the overall fundraising production since the campaign began. Our prospect pool is deep and generous.

The Senior Director will have the chance to work with a seasoned team of fundraising professionals and will serve as the "number two" staff member in Gift Planning. We seek someone with extensive and successful fundraising experience, with special expertise and knowledge of all gift planning vehicles and strategies.

Miami University is one of America's oldest public universities with a passionate alumni body. Its students are among the brightest in the nation, and its faculty are dedicated to providing a stellar experience that prepares those students for a world beyond Oxford. We look forward to welcoming the next great fundraising professional to Miami and the Division of University Advancement.

–Tom Herbert, Senior Vice President for University Advancement and
Brad Bundy, Senior Associate Vice President and Campaign Director

MIAMI UNIVERSITY'S COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION

[Miami University](#) is committed to creating an inclusive and effective teaching, learning, research, and working environment for all. Miami University is committed to and fully embraces the philosophy and belief that a diverse academic community is among an institution's greatest strengths. As decades of research and experience have shown, every unit and individual on campus benefits from diversity when there is an environment where people from a wide variety of backgrounds learn from one another, share ideas, and work collaboratively to ask and solve questions. This is especially important given Miami's commitment to excellence in undergraduate teaching and learning. A diverse and inclusive campus enhances the living, learning, and working environment for every student, staff, and faculty member. Together, these benefits help Miami achieve its special mission as a public institution in Ohio, educating students across the state and preparing them to be leaders in a variety of fields who are ready for the demands of the 21st century workforce. It therefore aspires to attract and retain a broadly diverse group of faculty, staff, and students.

The university views diversity holistically, understanding that the definition is constantly evolving. Its definition of diversity includes but is not limited to race, ethnicity, color, nationality, sex, sexual orientation, gender identity and expression, class, religion, disability, age, military status, visa status, economic status, geographic location, and language/linguistic ability. Diverse and well-reasoned ideas, approaches, and experiences are also essential parts of inclusion and equity. For more information on

Miami University's diversity initiatives, please visit the [Office of Institutional Diversity & Inclusion](#) webpage.

In alignment with Miami University's statement on Diversity and Inclusion, University Advancement recognizes that every Miamian has a unique story and unfortunately many are marked with challenges and pain based on one or more of their identities. It thus acknowledges the painful and difficult experiences at Miami past and present. It is committed to recognizing and celebrating all Miamians. It aspires to connect Miami with its diverse constituencies and create pathways for current and future Miamians of all backgrounds. University Advancement chooses to honor Miami University's holistic approach to and definition of diversity as its guide. View University Advancement's full Diversity, Equity, and Inclusion statement [here](#).

PRIMARY RESPONSIBILITIES

The senior director of development, gift planning will

- participate in the development and execution of gift planning marketing efforts;
- effect solicitation and stewardship calls to alumni and friends alone and with other staff, faculty, administrators, and alumni volunteers;
- prepare and present gift proposals to prospects with the input and assistance of faculty, administrators, and deans, as well as other constituent and central development officers, including proposals that may involve establishing multi-year commitments as well as gifts of real estate, personal property, securities, and gifts in wills, trusts, annuities and insurance;
- encourage and coordinate involvement of alumni and friends through campus visits and regional events;
- develop and implement assessment, cultivation, solicitation, and stewardship strategies for assigned prospects with the Office of Development staff, university faculty, and administrators; and
- perform duties that further the mission of the Office of Development under the guidance of the Assistant Vice President for Gift Planning.

LEADERSHIP AND KEY COLLEAGUES

Thomas W. Herbert

Senior Vice President for University Advancement

Tom Herbert was appointed Miami University's senior vice president for University Advancement effective October 1, 2012. He leads an advancement staff of approximately one hundred in all areas of alumni relations and development. He is also the president of the Miami University Foundation.

Prior to his current position Tom was at Dartmouth College where he first held the position of associate vice president, individual giving and was promoted to vice president of development. Before his Dartmouth appointment he served in various roles at Indiana University, including director of planned giving, executive director of development and alumni programs for the College of Arts and Sciences, and vice president for university wide programs at the Indiana University Foundation. He also served as an assistant vice president for development at the University of Michigan. Tom began his advancement career as a gift planning officer at Drake University.

Tom presents at development conferences for the Council for the Advancement and Support of Education ("CASE"), is a past presenter at the Big Ten Fundraising Institute as well as at Rice University's Center of Philanthropy. He has also developed and taught fundraising courses at Indiana University and co-authored a textbook on major and planned giving. Currently Tom serves on the CASE National Commission on

Philanthropy and on the national board of the National Association of College and University Business Officers (“NACUBO”) - the only advancement professional to do so.

Tom holds a BA in History from Northwestern University ('89) and a JD with honors from Illinois Institute of Technology, Chicago-Kent College of Law ('94). He is married to Kirsten Roberts and they have two sons, Zachary and Ethan.

Brad Bundy

Senior Associate Vice President and Campaign Director

Brad Bundy has been at Miami University since October of 2001. He was initially hired as the associate vice president for University Advancement. He later added the role of campaign director for Miami's *Campaign For Love and Honor*. In January of 2013, he assumed the role of senior associate vice president. Brad oversees all staff and aspects of the Office of Development for Miami. Brad has spent his entire career in advancement. He began his career at his Alma Mater, The Ohio State University. From there he served Ohio Wesleyan University for nine years, followed by six years at the University of Cincinnati Medical Center. Brad has a Bachelor of Arts Degree from The Ohio State University. In 2013, Brad was granted an Honorary Alumnus Award from the Alumni Association. He is married to Tammy, who received her MA from Miami. They have four children, all of whom are Miami graduates: Megan '09, Katey '12, Ryan '15, and Evan '18.

Jayne Whitehead

Assistant Vice President, Gift Planning

With a lifelong career in advancement and development all in higher education, Jayne Whitehead demonstrates a deeply held belief that higher education is the path to an enhanced quality of life for all. During this critical time of wealth transfer she leads a gift planning group that supports Miami University as it begins its fourth capital campaign.

Jayne began her advancement journey in 1982 while in law school where exposed to all sides of university advancement from recruitment to phonathons. She continued work in alumni and development programming at Butler county Community College and quickly moved to the University of Missouri where she served as the first major gift officer in the School of Business and Public Administration. She then was promoted to lead the Graham Center for Estate Planning before serving to lead the development effort as assistant vice chancellor for development during Mizzou's \$150 million campaign. She moved to the University of Florida as associate vice president for development and campaign director for Florida's \$750 million *It's Performance that Counts* Campaign before being recruited to serve as vice president for advancement at Miami University. After twelve years as vice president, in 2012 she returned to her first love of gift planning. She received her AB from Washington University in St. Louis, her Juris Doctorate at Washburn University, and did masters work in Soviet and East European Studies at the University of Kansas.

COMPETENCIES AND QUALIFICATIONS

Miami University seeks a senior director of development, gift planning with a commitment to the [mission and core values of Miami University](#); a bachelor's degree and at least five years of experience in development/fundraising, law, financial services, accounting, or other related experience; proven leadership and management techniques; outstanding oral and written communication skills; excellent organization skills and attention to detail; and a commitment to a collaborative approach to fundraising.

SALARY & BENEFITS

Miami University offers a competitive salary and comprehensive package of [employee benefits](#).

LOCATION

This position is located in Oxford, Ohio. A legendary college town, recently cited by Yahoo as the #3 College Town in the United States. Oxford, Ohio is a picturesque town brimming with ideas and opportunities. This position requires regional and national travel as well as some weekend and evening hours.

EQUAL OPPORTUNITY/AFFIRMATIVE ACTION STATEMENT AND CLERY ACT

Miami University, an Equal Opportunity/Affirmative Action employer, encourages applications from minorities, women, protected veterans and individuals with disabilities. Miami University prohibits harassment, discrimination and retaliation on the basis of age (40 years or older), color, disability, gender identity or expression, genetic information, military status, national origin (ancestry), pregnancy, race, religion, sex/gender, status as a parent or foster parent, sexual orientation, or protected veteran status in its application and admission processes, educational programs and activities, facilities, programs or employment practices. Requests for reasonable accommodations for disabilities related to employment should be directed to ADAFacultyStaff@MiamiOH.edu or 513-529-3560.

As part of the University's commitment to maintaining a healthy and safe living, learning, and working environment, we encourage you to read [Miami University's Annual Security & Fire Safety Report](#), which contains information about campus safety, crime statistics, and our drug and alcohol abuse and prevention program designed to prevent the unlawful possession, use, and distribution of drugs and alcohol on campus and at university events and activities. This report also contains information on programs and policies designed to prevent and address sexual violence, domestic violence, dating violence, and stalking. Each year, email notification of this website is made to all faculty, staff, and enrolled students. Written notification is also provided to prospective students and employees. Hard copies of the Annual Security & Fire Safety Report may be obtained from the Miami University Police Department at (513) 529-2223. A criminal background check is required. All campuses are smoke- and tobacco-free.

APPLICATION INSTRUCTIONS

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

Those candidates that are interested beyond an initial discussion will be asked to formally apply on Miami's HR website.

To apply for this position, visit:

[Senior Director of Development, Gift Planning, Miami University.](#)

To nominate a candidate, please contact Steven Wallace:

stevenwallace@aspenleadershipgroup.com.

All inquiries will be held in confidence.