

EXECUTIVE SEARCH

SENIOR VICE PRESIDENT FOR ADVANCEMENT



PHI DELTA THETA

Foundation

THE ORGANIZATION

The Fraternity

On December 30, 1848 six men known as the "Immortal Six" put their signatures to *The Bond of the Phi Delta Theta* which is built on three unwavering pillars: friendship, sound learning and rectitude. *The Bond* has remained unchanged to this day - to mold each brother into a greater version of himself by celebrating his individual uniqueness and, through encouragement, values, example and brotherhood, empower him to exceed his personal expectations.

With approximately 190 active chapters and colonies in 42 states and five Canadian provinces, the Fraternity has initiated more than 250,000 men, has more than 160,000 living alumni, and remains connected through more than 100 recognized alumni clubs across the U.S. and Canada as one of the largest and well-respected men's fraternity in North America. The Fraternity operates from the General Headquarters building on South Campus Avenue, across from Miami University in Oxford, Ohio and is the only Fraternity of its stature to feature an alcohol-free housing policy.

In the Fall of 2010, Phi Delta Theta's newly elected General Council and the General Headquarters staff redefined the Fraternity's mission and vision statements to become the premiere leadership organization. A new strategic plan, ***Phi Delt 2020*** has six strategic initiatives - Growth, Education, Support, Communication, Capacity and Funding - that serves as the Fraternity's "North Star".

The Foundation

The Phi Delta Theta Foundation was created in 1958 and chartered by the State of Ohio on August 16, 1960 as a 501(c)(3) charitable organization with a mission to strengthen men for life by building on the tradition of our core values: friendship, sound learning and rectitude.

From its early beginnings in raising scholarship funds, the Foundation has grown to support other educational activities like the Leadership Consultant program, the Kleberg Emerging Leaders Institute, the Presidents Leadership Conference, the educational portions of the General Convention, educational materials, and numerous other programs. With more than \$17 million in total assets, the Foundation to date has awarded more than \$4.1 million in scholarships and fellowships to outstanding young Phis and granted nearly \$10 million toward the Fraternity's premiere leadership and educational programs such as the Presidents Leadership Conference, the Kleberg Emerging Leaders Institute, the Leadership Consultant Program and the Alcohol- Free Housing initiative.

During the celebration of Phi Delta Theta's sesquicentennial anniversary in 1998 the Foundation undertook its first capital campaign - "The Living Bond," - for \$5 million. The campaign concluded in December of 1999 with gifts and pledges totaling over \$6.3 million. The campaign's success resulted in the addition of The Paul E. Martin Building to and the renovation of the General Headquarters in Oxford, Ohio. which houses the offices of the Phi Delta Theta Foundation and the Phi Delta Theta General Fraternity as well as The David Demaree Banta Memorial Library. The Phi Delta Theta Foundation currently has \$21.4 million in assets and a \$4.2 budget for 2017.

To better position the Fraternity and Foundation for success in conjunction with its strategic plan, the General Council and Foundation Trustees recently created a "one CEO" model that streamlined the governance structure and created greater collaboration and efficiencies between the two entities. The Executive Vice President and CEO of the Fraternity serves as President of the Foundation, and the Fraternity Chief Operating Officer oversees the daily activities of the Foundation.

Building the Bond Capital Campaign – Shortly after implementation of "Phi Delt 2020" the Foundation launched a fundraising campaign called "Building on the Bond" to raise dollars necessary to make this vision a reality. With a goal of \$20 million (\$17 million raised to date), the two major objectives of the campaign with associated named-giving opportunities include:

Whole Man Scholarships – Fundraising Goal = \$7.2 million (\$7.6. raised to date)
Established by Foundation donors who contribute a minimum of \$72,000 for their chapter or an associated chapter. Recipients represent less than 1% of all Phi Delta Theta undergraduate members and are the 'best of the best, brightest of the brightest' in the Phi Delt Nation. Each participant is invited to the Kleberg Emerging Leaders Institute to participate in the Shaffer Honors College of Leadership and is given a scholarship of up to a \$1,000 academic scholarship to assist with the cost of their college education. Recipients also experience a very intensive leadership immersion experience with other Whole Man Scholars from the United States and Canada at the Kleberg Emerging Leaders Institute in Oxford, Ohio, held each summer.

Leadership and Ethics Academy – Fundraising Goal = \$9.0 million (\$4.3 million raised to date) The Academy focuses on values-based leadership development and undergraduate and alumni officer development through two flagship leadership conferences, the Presidents Leadership Conference and the Kleberg Emerging Leaders Institute. Additionally, the Academy supports numerous other conferences and programs that constitute the Fraternity's comprehensive efforts to provide the best possible education and leadership training for undergraduates and alumni volunteers as set forth in the Phi Delt 2020 strategic plan.

Annual Fund – Fundraising Goal: \$1,000,000 (\$920,000+ raised in 2016) Unrestricted support for Foundation operations and programming. Primary strategies include targeted, segmented direct mail campaigns with the assistance of an outside vendor and solicitations made by the development officers at the chapter level. A variety of recognition levels have been established for annual donors.

Housing Campaign Services – Working in coordination with the Fraternity Director of Housing and Facilities, the Foundation assists house corporations with a full suite of fundraising services from General Headquarters staff members such as fundraising and communication services, consultation, legal evaluation, event planning, affinity and wealth screening, and centralized collection of all gifts. Following the planning and design of a housing project, Foundation staff lead and conduct campaign feasibility studies, develop the overall campaign strategy and direct its implementation, produce and write chapter newsletters (paper and electronic) and future campaign updates and solicitations, lead the campaign board in securing lead gifts of major and mid-level donor prospects with, and/or without, volunteer assistance, assist in event planning to properly celebrate the campaign and recognize donors, and provide full General Headquarters administrative support, including gift collections, acknowledgment and donor recognition. A key strategy of Housing Campaign Services is to help to identify and qualify potential donors for other initiatives and programs of the Foundation.

THE SENIOR VICE PRESIDENT FOR ADVANCEMENT

Roles and Responsibilities - Recognizing the tremendous fundraising potential represented by the 160,000 living alumni of Phi Delta Theta Fraternity, the Foundation has made a significant commitment to building its capacity and infrastructure to pursue annual, major, and planned gifts that will make a greater impact on individual fraternities and Phi Delt Nation.

The position of Senior Vice President for Advancement (SVP) was created to lead the fundraising team comprised of three Directors – Development, Annual Giving, and Stewardship - two development officers who report to the Director of Development and work remotely, and two departmental administrative assistants, one each in stewardship and annual giving.

The Senior Vice President for Advancement reports directly to the President of the Foundation and serves a key member of the executive team alongside the Chief Operating Officer and the Foundation Trustees.

As a thought leader, coach, and mentor within the organization, the SVP will:

- Lead Phi Delta Theta in building a culture of philanthropy at all levels of the organization;
- Provide strategic counsel and direction to engage trustees, volunteers, executives, and staff in successfully advancing the Foundation's fundraising goals and related initiatives;
- Lead the planning, policy development, implementation, and reporting for a comprehensive, donor-centric development program that attracts increasing levels of annual, major, and planned gifts to advance the mission.
- Manage and nurture relationships with a portfolio of 75-125 prospects and donors to build trust and confidence in the operations of the Foundation and the stewardship of the funds entrusted to its care to sustain lifelong commitments to Phi Delta Theta.
- Plan and implement special events of the Fraternity/Foundation and alumni clubs;
- Participate in Phi Delta Theta's major conferences and other meetings supported by the Foundation;
- Participate in professional and interfraternity conferences (NICF/AFP) related to Foundation activities and;
- Assist the Chief Operating Officer in the planning and execution of budget, Foundation staff performance reviews and tracking of performance against strategic initiatives.

This position will require extensive travel, estimated to be 50%, to meet prospective major donors and to collaborate with and support other Phi Delta Theta efforts.

Desired Personal Characteristics – The SVP will:

- Be a Phi Delta Theta member with a strong affinity to and passion for the Phi Delta Theta mission, vision, values, and goals
- Be a big-picture, strategic thinker that can translate plans into action and is willing to take risks based on knowledge and experience
- Be a strong communicator both internally and externally
- Be a good listener and team player that values and nurtures relationships between and among the Trustees, volunteers, staff, and donors
- Exhibit a servant leadership style built on strong character and integrity that models the way for the Foundation staff in their personal and professional growth.

Desired Professional Competencies -

Leadership and Management - The SVP will be able to:

- Understand the laws, regulations, principles, and models for not-for-profit organizations, including interactions with stakeholders such as donors, staff, and volunteers.
- Create a culture of philanthropy that advances fundraising across Phi Delta Theta.
- Ensure sound management and administrative policies and procedures to support fundraising functions.
- Ensure the integration of fundraising and philanthropy in Phi Delta Theta's strategic plan
- Demonstrate a thorough understanding of the accounting and investment principles for not-for-profit organizations
- Ensure that accepted and appropriate standards and metrics are used to measure and analyze fundraising programs.
- Foster professionalism and a team-oriented work environment to enhance individual performance and organizational results
- Support the growth and development of team members through professional organization membership, mentorship, research, committee involvement, and sources of continuing education. Participate as an active and contributing member of the fundraising profession through activities such as mentoring, continuing education, research, and membership in professional associations.
- Ensure that all fundraising activities, policies, and practices reflect the values of Phi Delta Theta, the ethical standards of the nonprofit fundraising profession, and current privacy legislation and regulations.

Fundraising: The SVP will be able to:

- Develop and implement detailed plans that define the fundraising strategies and methods for the engagement, cultivation, solicitation, acceptance, acknowledgment, recognition, and on-going stewardship of philanthropic gifts and pledges.
- Employ donor-focused prospect research methodologies to match the Foundation's fundraising programs and initiatives with the interests, values, and motivations of current and prospective donors;
- Validate relevant prospect and donor information with key stakeholders to establish a plan of action for engagement, cultivation, solicitation, and stewardship;
- Employ feasibility and planning studies as necessary to determine fundraising potential of Foundation initiatives and of prospective donors.

- Develop and implement a comprehensive, donor-focused communications plan to inform constituents about the Phi Delta Theta mission, vision, values, strategic needs, funding priorities, and gift opportunities and to facilitate informed gift decisions.
- Develop a Case for Support for fundraising objectives by involving key stakeholders in the development and articulation of the rationale for supporting Phi Delta Theta that matches the interests, values, and motivation of current and prospective donors.
- Initiate and strengthen relationships with constituents through systematic cultivation and stewardship plans designed to build trust in, and long-term commitment to Phi Delta Theta;
- Understand the external influences such as corporate, governmental, social, civic, professional, and religious affiliations that influence relationships with Phi Delta Theta.
- Create structured processes for the identification, recruitment, orientation, training, evaluation, recognition, retention and succession of volunteers to engage in the fundraising process to increase organizational capacity.
- Plan and manage the various donor-focused fundraising solicitation methods and their interrelationships to determine the appropriate frequency, timing, and peer relationships required to successfully solicit and secure philanthropic commitments to meet fundraising goals.
- Execute appropriate gift acceptance policies, donor agreements and payment structures for contributions.
- Implement programs, policies, and procedures to acknowledge and recognize philanthropic commitments in ways that are meaningful to donors and appropriate to the mission and values of the Phi Delta Theta;
- Determine when and how it is appropriate to use incentives such as member benefits, special invitations, premiums, and naming rights for various types and amounts of giving.
- Ensure that gifts are properly managed in accordance with donor intent and provide regular reports on the uses and impact of donations to demonstrate transparency and build trust.
- Ensure that proper data and information on prospects and donors are maintained on the Foundation's fundraising database (Compass) and that pledges and gifts are accurately documented.
- Ensure the capital campaign goal of \$20 million is achieved before 2020, the annual fund goal of \$1 million is realized and the goals of the Housing Campaign Services are fulfilled as well.

Minimum qualifications:

- Member of Phi Delta Theta
- 7 years or more of professional fundraising experience
- Proven track record in major gifts fundraising
- Experience leading a comprehensive development program that includes annual funds, major gifts, planned gifts, capital campaigns, and special events

PLEASE NOTE: Though the main office is at the Phi Delta Theta General Headquarters on the campus of Miami University in Oxford, OH, the Senior Vice President will not be required to relocate to Oxford and may telecommute with the understanding that a significant amount of time will be required in Oxford to lead and support the Foundation staff.

Phi Delta Theta offers a competitive compensation and benefits package.

The Burcham Solutions Group, LLC has been engaged to conduct the search. All interested candidates should submit a letter of interest and resume to Timothy R. Burcham, CFRE at tim@burchamsolutionsgroup.com no later than **April 30, 2017**.

