



Senior Director of Annual Giving
Position Prospectus | 2023





Stony Brook University has partnered with AGB Search to identify its next Senior Director of Annual Giving.

This document provides an overview of Stony Brook University, information and details about the opportunity, and desired candidate qualifications and characteristics.

Throughout the document, [red text passages](#) provide hyperlinks to document pages and online resources with more detailed information.

We invite you to join Stony Brook University as the University “goes beyond the expected.”

Table of Contents

- 03 | [Stony Brook University – History & Mission](#)
- 04 | [The Opportunity](#)
- 05 | [About Annual Giving at Stony Brook](#)
- 06 | [University Advancement](#)
- 07 | [Organizational Leadership](#)
- 08 | [The Community](#)
- 09 | [How to Apply](#)

GOING BEYOND THE EXPECTED

Stony Brook is one of America’s most dynamic public universities. We are a center of academic excellence and an internationally recognized research institution that offers all students a world-class education.



HISTORY & MISSION

Stony Brook University, a SUNY flagship, was originally 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.

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.”

The University campus lies about 60 miles east of New York City and 60 miles west of Montauk Point. It is only a short distance to the Atlantic beaches of the South Shore and the vineyards of the East End. Situated on 1,039 acres on the North Shore of Long Island, Stony Brook University has a four-season climate, tempered by proximity to the Atlantic Ocean and Long Island Sound.

Stony Brook University has a five-part mission:

1. to provide comprehensive undergraduate, graduate, and professional education of the highest quality;
2. to carry out research and intellectual endeavors of the highest international standards that advance knowledge and have immediate- or long-range practical significance;
3. to provide leadership for economic growth, technology, and culture for neighboring communities and the wider geographic region;
4. to provide state-of-the-art innovative health care, while serving as a resource to a regional healthcare network and the traditionally underserved;
5. to fulfill these objectives while celebrating diversity and positioning the University in the global community.



HISTORY

1957 Founded

2001 Became member of Association of American Universities

LOCATION

60 miles East of New York City

3 miles From West Meadow Beach on the eastern seaboard

1,039 acres On the North Shore of Long Island

THE OPPORTUNITY

Stony Brook University seeks an accomplished, strategic, and highly effective fundraising professional to assume leadership of its annual giving program and team, and position the program for growth and expansion over time. The Senior Director will establish a clear vision and plan for a successful program and will be expected to implement effective strategies, tactics, and best practices to achieve the program's goals in both the short and long term. Importantly, the Senior Director will contribute to building a strong culture of giving at Stony Brook and a pipeline of major gift donors for the University's campaign and future fundraising programs. The Senior Director will strategically develop, execute, and manage a comprehensive, integrated, and forward-looking multi-channel annual giving program. The incumbent will be responsible for working effectively in a complex institutional setting, developing and sustaining productive and effective relationships with alumni, donors, volunteers, colleagues, and senior leadership. They will have strong interpersonal and problem-solving skills to work with attention to detail and the ability to navigate a complex work environment.

Stony Brook University is one of the newest and youngest members of the Association of American Universities, a group comprised of the top 66 research universities in the United States and Canada, and is eager to continue its trajectory toward the top of higher education institutions in the world. As a young research institution with unlimited potential, the University enables both excellence and access in equal measure. The next Senior Director of Annual Giving will champion the vibrant community of Stony Brook and support the mission of being a national leader in generating social mobility for its students.

In fiscal year 2022-23, the University closed a record year, raising over \$184 million in gifts and pledges through the generous support of nearly 10,000 donors. This group comprised thousands of first-time donors, and supported research, endowed faculty positions, scholarships, fellowships, facilities, campus life, and other academic support.

Required Qualifications:

A bachelor's degree is required (foreign equivalent or higher). Six (6) years of full-time fundraising experience in higher education, a complex healthcare system, or in a non-profit institution. Experience in Annual Fund solicitation and administration, sales, or marketing. Experience as a manager and/or leader of fundraising teams and/or volunteers. Experience with Microsoft and/or Google applications.

Preferred Qualifications:

A master's degree is preferred (foreign equivalent or higher). Additional years (7+) of full-time experience in higher education, development, fundraising, healthcare, or a non-profit institution. Knowledge of CRM systems and/or working with various technologies.

Key Responsibilities:

- Develop, execute and manage a comprehensive, integrated annual giving plan to generate gifts from alumni, friends, University faculty and staff, and other constituents in support of Stony Brook University's current operations.
 - Develop objectives, timelines, and evaluation metrics that address alumni participation, donor retention and acquisition, donor loyalty and consistency of annual giving, and the expansion of annual gift revenue as part of the comprehensive, integrated annual giving plan.
 - Partner with the MarComs team to develop effective messaging, direct mail and online communications, and solicitation activities within defined constituent and market segments.
 - Work with the Donor Experience Team to develop and execute annual donor

stewardship strategies.

- Devise a multi-year strategic plan to guide the Leadership Annual Giving efforts.
 - Provide regular reports, as appropriate, on LAG progress and results.
 - Manage the Annual Giving operating budget.
 - Work with the Director of Leadership Annual Giving to align strategies and track progress toward goals, performance metrics, and growth trajectory.
- Oversee and manage the work of the Annual Giving Team.
 - Participate in planning initiatives for the public phase of Stony Brook's comprehensive campaign to ensure that the annual fund program is integrated into the campaign and positioned properly.
 - Represent the Stony Brook annual giving program on a broad range of both internal and external constituencies and serve as the primary annual giving liaison for events and initiatives that promote annual giving or steward annual giving donors.
 - Collaborate with colleagues throughout Advancement to ensure effective and coordinated fundraising strategies are implemented.
- Other duties as assigned.

ABOUT ANNUAL GIVING AT STONY BROOK

Annual gifts provide the University's leadership with the type of flexible resources necessary to fund innovative programs, address urgent needs, and ensure a level of quality and excellence not funded by state appropriations or tuition revenues. Each year, thousands of alumni, parents, University faculty and staff, and friends demonstrate that Stony Brook is a priority to them by making an annual gift. Annual gifts at Stony Brook have been designated for discretionary use, or specific University programs, including key initiatives of President Maurie McInnis, a particular college or school, a center or institute, or a specific department, program or existing fund.

Some of the more popular annual giving vehicles at Stony Brook include:

- The Stony Brook Fund for Excellence
 - The Stony Brook Annual Fund supports scholarships, graduate research stipends, start up money for new initiatives, and various academic priorities across the various schools and colleges. It allows the deans, directors, and other faculty to respond quickly to new opportunities and urgent needs not covered by tuition and endowment spending.
- The Parent Fund
 - Parents have greatly enhanced student experiences through their philanthropic support through the Parent Fund to support Career Services, the Academic Advising Center, Student Health Services, and Libraries on campus.
- The John Ramsey Leadership Society
 - Launched in 2022, the John Ramsey Leadership Society recognizes Stony Brook Athletics' most ardent and generous supporters, whose generosity goes above and beyond in transforming the lives of Stony Brook student-athletes. The Society is comprised of donors who make major gift commitments to any departmental priority, and members are recognized in the Society for five years from the date of their commitment. Donors have the flexibility to choose to support any Sport-Specific Fund for Excellence, Seawolves United Unrestricted Giving, or any current department capital project, endowment, or scholarship need. Society members receive high-end, exclusive stewardship opportunities, including regular Zoom calls with Stony Brook's Director of Athletics and recognition within the athletics facilities and at home football, basketball and lacrosse games.

- Seawolf Sustainer Monthly Giving
 - A generous group of Seawolf Sustainers provide philanthropic support to the University on a monthly basis. These gifts go to work immediately to deliver extraordinary opportunities for learning and discovery. Their support also provides Stony Brook University and Stony Brook Medicine with the resources to plan ahead and ensure stable funding is available to meet the needs of current and future Seawolves.
 - Perform data analysis related to all aspects of the annual giving program. Using data to evaluate current annual giving programs and provide insight for ongoing solicitations. Maintaining reports and dashboards needed to project goals and create benchmarks. Enhance the annual giving team's use of analytics to improve segmentation and messaging and to create a personal and positive experience for donors.

UNIVERSITY ADVANCEMENT

The Stony Brook University Advancement Division connects and builds relationships with friends, foundations, corporations, and alumni to raise funds for the University, Stony Brook Medicine, the Long Island State Veterans Home, and related funding priorities that advance the University's mission.

Advancement is composed of these major areas:

- **Advancement Services:** Responsible for Advancement-related operations, including technology management, prospect research, and donor relations.
- **Advancement Communications:** Creates the tools and messaging that help persuade friends and alumni to invest in Stony Brook.
- **Alumni Relations:** Connects and involves alumni, students, and parents with the University and each other, and advises and oversees the Stony Brook Alumni Association.
- **Development:** Comprises all frontline fundraising activity, including major gifts, leadership annual gifts, the Annual Fund, Gift Planning, and Corporate and Foundation Relations.
- **Special Events:** Manages Advancement-initiated events on and off campus that seek to engage, cultivate, and steward fundraising prospects and donors.
- **Talent Management:** Responsible for recruiting, developing, and retaining our division's staff.
- **Stony Brook Foundation:** While it is a separate, 501(c) (3) nonprofit organization, the Stony Brook Foundation's employees and the Advancement division partner in raising funds to support the mission of Stony Brook University.

Awards and Recognition

Stony Brook University's Advancement division has earned numerous accolades in recent years, a testament to its philosophy of embracing innovation. In 2020, Stony Brook was one of only two public research doctoral universities with a hospital that received the Council for Advancement and Support of Education (CASE)'s Overall Improvement award. Recently, the Advancement division was recognized for its innovative work by SUNY Council of University Advancement Directors (SUNYCUAD), garnering four awards of excellence for alumni relations, events, social media campaigns, and senior class giving. Additionally, the division earned the Gold Award from the CASE District II region for its groundbreaking work on digital advertising.

In June 2023, the [Simons Foundation announced a historic \\$500 million endowment gift](#) to Stony Brook University – the largest unrestricted donation to an institution of higher education in U.S. history. In addition to this historic gift and previous gifts to Stony Brook University, following Stony Brook's successful bid to serve as the anchor institution of The New York Climate Exchange, the Simons Foundation committed \$100 million to the project's expected \$700 million budget.

The state of New York has pledged to support Stony Brook University as a flagship campus of the SUNY System, creating an endowment matching program that will help Stony Brook expand its philanthropic

endeavors. The program provides authorization for four universities to receive up to \$200 million in a 1:2 state match to support their endowment funds. A total of \$500 million is allocated for the initiative, and universities may obtain more than \$200 million if all funds are not claimed at the end of three years.

ORGANIZATIONAL LEADERSHIP



Justin Fincher, Ph.D.

Vice President for Advancement
Executive Director of the Stony Brook Foundation

Justin Fincher, Ph.D., 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, Dr. Fincher provides leadership for the University's development and alumni relations operations.

Prior to joining Stony Brook in August 2021, Dr. 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. Dr. 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, Dr. 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.



Brooke Carroll

Assistant Vice President for Constituent Experience

Brooke Carroll serves as the Assistant Vice President for Constituent Experience at Stony Brook University. Reporting directly to the Vice President of Advancement Justin Fincher, and serving as a member of his senior leadership team, Brooke manages the day-to-day operations of the annual giving and donor experience teams. This includes many fundraisers collectively supporting Stony Brook's generous alumni, parents, and friends. Prior to joining Stony Brook in September 2022, Carroll was the Vice President for Advancement at

Hawaii Pacific University.

Prior to Hawaii Pacific University, Carroll served as the Director of Development for the School of Music and Dance at the University of Oregon, and was the Executive Director of Annual Giving and Alumni Relations at the University of California, Berkeley School of Law. Carroll holds a bachelor's degree in Art History for Sonoma State University and a master of business administration from Concordia University – Portland.

THE COMMUNITY

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 tri-state area.



WE ARE STONY BROOK

Driven by momentum to make a real difference, our students, faculty and staff are paving the way to a brighter future.

HOW TO APPLY

Stony Brook University has retained AGB Search to manage the recruitment process. Interested candidates must submit a current resume and a letter of interest that addresses the leadership opportunities, key responsibilities, and qualifications outlined in this leadership profile.

Applications will be reviewed as they are received, and the position will remain open until filled. Application materials (PDF) should be sent electronically to: <http://bit.ly/3SeZy2E>

Questions regarding the application process should be directed to:
StonyBrookSrDoDAnnGiv@agbsearch.com

Please direct all nominations and expressions of interest to one of AGB Search's consultants:

Andrew Bowen
Executive Search Consultant
Andrew.Bowen@agbsearch.com
802.345.1279

Joy Yablonsky
Executive Search Consultant
Joy.Yablonsky@agbsearch.com
215.934.1386

Howard Lipman
Executive Search Consultant
Howard.Lipman@agbsearch.com
954.980.3409

Lynn DellaPietra
Executive Search Associate
Lynn.DellaPietra@agbsearch.com
202.640.6723

**AGB
SEARCH**

Advancing Higher Education Leadership



**Stony Brook
University**

Stony Brook University prohibits discrimination on the basis of race, sex, sexual orientation, gender identity and expression, religion, age, color, creed, national or ethnic origin, disability, marital status, familial status, genetic predisposition, criminal conviction, domestic violence victim status, veteran status and/or military status and all other protected classes and groups under Federal and State Laws in the administration of its policies, programs, activities, or other Stony Brook University administered programs or employment. For additional information regarding Stony Brook University's Policy on non-discrimination, please review: [the Equal Opportunity/Affirmative Action Policy](#).