



THE UNIVERSITY OF UTAH

VICE PRESIDENT FOR INSTITUTIONAL ADVANCEMENT
SEPTEMBER 2018

Position Specification



This position specification provides information about The University of Utah and the position of Vice President for Institutional Advancement. It is to assist qualified individuals in assessing their interest in the position.

The search is being done in partnership with Summit Search Solutions Inc.

THE OPPORTUNITY

The University of Utah invites nominations and applications for the position of Vice President for Institutional Advancement (VPIA). The VPIA serves as the chief strategist in seeking philanthropic support for the institution. The VPIA plays a major leadership role in planning, organizing, managing, and resourcing the University's development and alumni relations program, including a recently launched major comprehensive campaign.

The VPIA works directly with the president, vice presidents, deans, and directors to establish fundraising priorities and strengthen both the central development effort, as well as development efforts at the college and unit level to increase private support for University priorities.

The University of Utah is among the nation's top 25 public universities in attracting private resources for investment in its programs, capital needs, and endowment. It has been actively raising private funds for more than four decades and has completed three successful comprehensive campaigns. Volunteer leadership at the University is strong, including its Board of Trustees, National Advisory Council, and experienced volunteer boards at the college and unit level. This is a time of great excitement at the University because of the very positive leadership being provided by the University's new President, Ruth V. Watkins.

The University most recent comprehensive campaign concluded in 2014, raising \$1.65B from some 130,000 donors. The University raised a total of \$281 million in new commitments in FY 2017-18 and as of early August had raised just over \$1B in the quiet phase of the new comprehensive campaign (*Imagine New Heights*). The University's endowment stands at \$1.013B

The University of Utah's development program combines a strong Central Advancement Office, which provides support to colleges and units, with a strong culture of fund raising at the college and unit level. All of the University's colleges, and most of its major units, have their own development officers who rely on the central office for services. Most chief advancement officers in the colleges report jointly to both their dean and to the Central Advancement Office. As part of its new campaign, the University is increasing its advancement investment at both the central and college/unit levels.

The University of Utah has more than 280,000 worldwide alumni. The University recently complete a successful national search process resulting in the hiring of a new Executive Director of Alumni and Constituent Engagement, a position that reports to the VPIA. In addition to this position, the University is well served by a group of dedicated alumni volunteers, represented by an active Alumni board.

The University seeks a Vice President for Institutional Advancement who will provide expertise, energy, a fresh perspective and new approaches all facets of a modern, successful and constantly striving program of advancement for a top national research university and Utah's flagship university.



The University of Utah

The University of Utah is classified by the Carnegie Foundation as one of 81 public Research 1 (Highest Research) universities from more than 4,600 U.S. institutions.

In the last five years, extramural research funding has increased by \$126 million dollars and the University received \$515 million in total awards in FY 2018. It is the flagship institution of the Utah System of Higher Education. The University is the oldest university and largest public university in the state, enrolling almost 33,000 graduate and undergraduate students from all 50 states and more than 100 countries. The University has the only School of Medicine in the state and its University Hospital is the finest medical-care facility in the Intermountain West. With revenues in excess of \$4.2 billion (FY17), the University is one of Utah's primary eco-

nommic engines. The institution generates more than \$600 million annually for the state of Utah in non-tax revenue, is one of the state's largest employers with more than 3,300 faculty members and 33,000 full time and part time employees. The academic program offers a broad range of study through its 18 colleges, many of which are nationally recognized for leadership in their fields.

The University is located on a beautiful campus of 1,500 acres in a cosmopolitan city where there is true balance of life, including access to the finest outdoor recreational activities and cultural pursuits.



MISSION

The University of Utah fosters student success by preparing students from diverse backgrounds for lives of impact as leaders and citizens. We generate and share new knowledge, discoveries and innovations, and we engage local and global communities to promote education, health and quality of life. These contributions, in addition to responsible stewardship of our intellectual, physical and financial resources, ensure the long-term success and viability of the institution.

LEADERSHIP AND GOVERNANCE

President Ruth V. Watkins became the 16th President of the University of Utah in April 2018. She had served as the Senior Vice President for Academic Affairs at the University of Utah since August 2013. She has been an advocate for advancing the success and impact of the U as a top-tier research university, including enhancing student success through degree completion and expanding research and creative activity. Dr. Watkins came to Utah from the University of Illinois, where she spent 20 years in leadership and faculty roles. She earned a master's degree and a doctorate in child language at the University of Kansas; her scholarship focuses on communication development and disabilities in young children. Dr. Watkins' research and training endeavors have earned external funding and she has been recognized for excellence in teaching.

The University of Utah is governed by a Board of Trustees who determine the University's general policies, including the establishment of new schools and



colleges; makes laws for its government; manages its investments; and directs the expenditure of its funds.

The National Advisory Council brings a special strength to the University of Utah. Since its founding in 1968, distinguished members have contributed time, interest, effort, experience, and wisdom to furthering the University's needs and to assisting in its development and growth.

In regular, semiannual meetings with the administration, faculty, and students, members of the Council discuss ways to solve University challenges. They participate in private fundraising programs. They promote the national reputation of the University through the cultivation and nurturing of professional and personal relationships across a wide spectrum of business, artistic, industrial, financial, and educational pursuits.

The University looks to the Council for input on such matters as investments and financial policy, long-range plans (both academic and administrative), and the relevance of University programs to the working world and the realm of ideas and people. Council members keep the University informed about its standing in comparison with other institutions with which they may have ties.





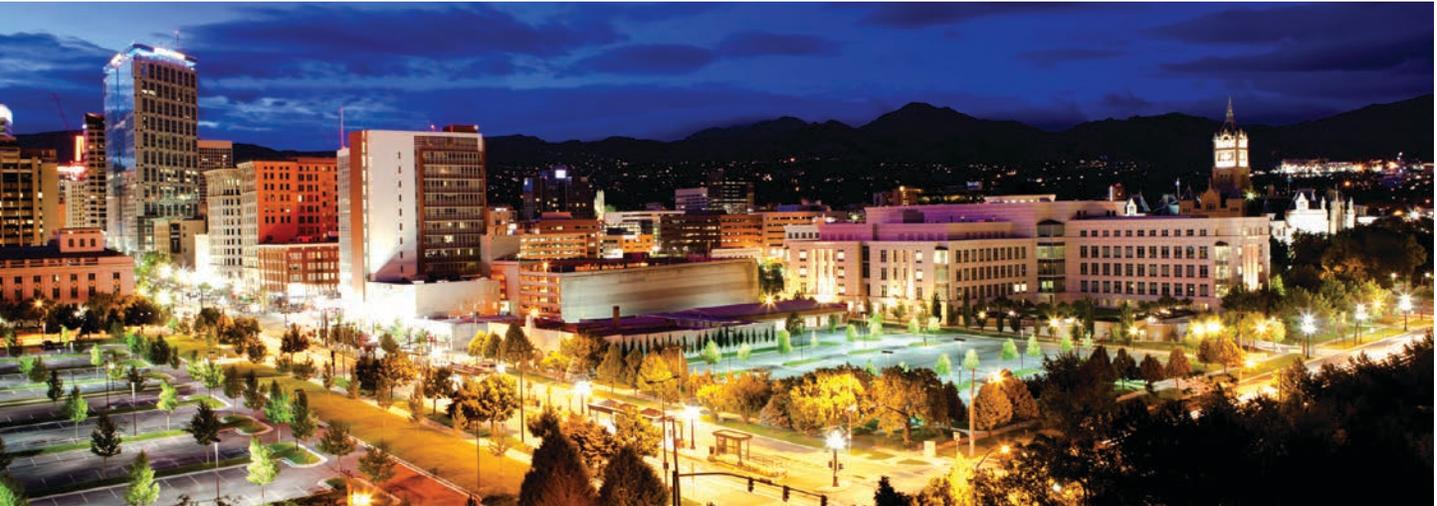
Through continuing consultation and evaluation, they sharpen the University's own review and improvement processes. They provide legislative and corporate liaisons at many levels. National Advisory Council members serve on campus, college, and departmental committees. They lecture on campus, counsel with faculty and students, and conduct job placement advisory sessions for recent graduates and alumni.

More information is available at:
www.utah.edu (University of Utah)
giving.utah.edu (Advancement Office)
www.alumni.utah.edu (Alumni Association)





Salt Lake City and Utah



At an elevation of 4,330 feet above sea level, the University is set on the east bench of the Salt Lake Valley. To the west stretches the entire valley, to the east the towering mountains of the Wasatch Range. The University is located in incorporated Salt Lake City, which has a population of 193,744 people; the city sits at the north end of Salt Lake Valley, which has a population of 1,153,340. Beyond that, the entire Wasatch Front, from Provo north to Ogden (with Salt Lake in the middle) encompasses well over 2.3 million people.

Frequently listed by national magazines and websites among the “best places to live” due to a variety of factors including recreational options, the business environment, climate, and a low crime rate, Salt Lake City is the 23rd largest metropolitan area in the United States. Forbes recently ranked Salt Lake City as the 14th best place for business and careers. In 2017, Salt Lake City was ranked as the nation’s second-friendliest city according to *Travel+Leisure* magazine. The international airport is just nine minutes from downtown and getting around is easy on TRAX, the city’s ever-expanding light rail transit system. TRAX lines now connect campus with the airport and much of the Salt Lake Valley.



In addition to the diverse assortment of restaurants and bars (with culinary options running the gamut from tapas bars to nouvelle cuisine), there are two beautiful mixed-use shopping/living areas, — The Gateway, just to the west of downtown, and City Creek, right in the heart of downtown. The NBA's Utah Jazz is a downtown staple, as is the Triple-A Salt Lake Bees of baseball's Pacific Coast League. Also on our campus, you will find the Utah Museum of Fine Arts, the Natural History Museum of Utah, and Red Butte Garden and Arboretum, and the University was the founding force behind the much acclaimed Utah Symphony and Ballet West, fixtures of the Salt Lake cultural scene. KUED and KUER, regional public broadcasting stations also are based at the University.



Utahns spend much of their time outdoors. This year, Utah became the first state to earn three stars in the iconic Michelin guide for being an exceptional destination. From campus, seven world-renowned ski resorts are just 30 minutes away. Five National Parks are within a five-hour drive. Forty golf courses are strategically located throughout the valley and nearby mountains. And hundreds of miles of hiking and biking trails can be accessed just to the east of campus. For a quick getaway, the historic mining town of Park City, home to the Sundance Film Festival, is just a 30-minute drive from Salt Lake.



Beyond the state, Los Angeles is a 10-hour drive to the southwest, Las Vegas eight hours due south. Boise is four and a half hours to the north, and Denver is eight hours to the east.





THE ROLE OF THE

Vice President for Institutional Advancement

The VPIA is responsible for the coordination and strategic direction of campus efforts to obtain private philanthropic support to enhance academic excellence and ensure the University's position as a national leader in teaching, research and service. Additionally, the VPIA provides leadership for and oversight of the University's Alumni Association. The VPIA will assure good stewardship of attained funds and established endowments as well as promoting positive relationships with alumni. In addition, the VPIA will oversee special event efforts; develop external relations with alumni and friends of the University, potential donors, corporate partners and foundations; and oversee endowment administration with deans and unit directors. The VPIA will also be responsible for the coordination of staff and programmatic support for campus-wide development resources such as gift administration, prospect management and database systems.

The Vice President reports directly to the President of the University of Utah and is a member of the President's Cabinet. She/he works directly with the President on major fundraising activities.

The Vice President oversees the central campus Advancement Office, including the Alumni Association. The Chief Philanthropy Officer/Associate Vice President for U Health has a formal dual report to the VPIA and the Senior Vice President for U Health. Colleges and units on campus separately support development operations; most of those area chief advancement officers have a dual report to their Dean or Director and the VPIA's office.

Total development budget across the University of Utah is \$18.2M. This includes the main campus Development Office, the Alumni Association, U Health, and allocations from the colleges and areas.

The VPIA will have executive responsibility for the following areas:

- Major Gifts and Planned Giving
- Corporate and Foundation Relations
- Endowed Giving
- Annual Giving
- Alumni Engagement
- Donor Communications and Constituent Relations
- Development Events
- Fundraising Marketing
- Prospect Development
- Information Services and Database Administration
- Gift Administration and Donor Records
- Personnel Decisions in the Central Advancement Office

The VPIA coordinates closely with the Senior Vice President for Academic Affairs, the Senior Vice President for U Health and the Chief Philanthropy Officer for U Health to ensure close cooperation between activities on the main campus and the U Health campus.

In addition, the Vice President will:

- Serve as the chief strategist in seeking philanthropic support for the University;
- Oversee the daily operations of the campus' development resources and fundraising programs;
- Work directly with the President, vice presidents, deans, and directors to establish fund raising priorities, plan donor requests and directly seek donor support;
- Establish and maintain development standards and procedures for the University, including prospect management, donor clearance, gift acceptance policies, and the complete range of fundraising best practices;
- Serve as a principal gift officer, working directly with senior administrators to solicit and steward principal gifts;
- Appoint and direct the management team in the Central Advancement Office, and supervise the Executive Director of Alumni and Constituent Engagement, ensuring expertise and leadership in the areas of fundraising, alumni relations, technology, and campus support services, including marketing, constituent relations and other advancement support programs;
- Both directly, and through the services of the Central Advancement Office, support the fundraising activities of colleges and other primary units of the University;
- Develop and coordinate giving options for alumni and friends of the University;
- Coordinate prospect development to identify new donor prospects and get qualified leads into fundraiser portfolios.

OPPORTUNITIES AND EXPECTATIONS FOR LEADERSHIP

There is a strong sense of excitement at the University of Utah today. There is new leadership at the University, at both the administrative and college level, as well as an energized and growing business community. There is wide recognition throughout the state of the extraordinary contribution the University of Utah makes to the fields of health, science and technology, the humanities, business, law, the fine arts and other areas.

The University is building a remarkable base of support as evidenced by the number of named buildings on campus and the number of endowed chairs throughout its colleges.

The Vice President's challenge is to build on a strong foundation of private support to lead a premier advancement operation. Success in the role will be evidenced by the ability to:

LEAD AN INSTITUTION-WIDE, COMPREHENSIVE CAMPAIGN TO SUCCESSFUL COMPLETION

The VPIA will have overall leadership of the University's next campaign (FY 2014 to FY 2022) with a goal of \$2 billion. This will be based on best practices and previous successful experience in directing such an ambitious donor campaign.

BUILD A STRONG AND EXTENSIVE MAJOR GIFTS PROGRAM

The University of Utah has conducted three comprehensive campaigns, which substantially exceeded their original goals. Like many public universities, the historic base of philanthropic support has come from its corporate and foundation partners and from a number of individual major gift donors, many of whom live in state and are closely connected to the University.

To achieve its potential, the University must broaden and deepen its donor base. While the most recent

campaign substantially grew the base of major and principal gift donors, there is significant potential for increased major donor support. Developing a plan to realize that potential, combining the resources at the central and college level will be one of the key challenges and opportunities for the new VPIA.

The VPIA will be responsible for developing new approaches to major gifts fundraising that works with the University's culture of distributed responsibility for fund raising. This includes establishing strong prospect management practices, setting common performance metrics for major gift officers, and establishing a strong culture of professional development and collaboration among the development officers that affords opportunities for multidisciplinary, transformational giving as well as professional advancement.

BROADEN THE BASE OF DONORS

As the University positions itself for future campaigns, a new generation of donors who will be invested in the University's future must be identified, cultivated and engaged. The University has only just begun to tap its enormous constituent base. The VPIA, working with the Alumni Association and the colleges/units, will develop new and creative approaches to alumni, donor, and parent engagement, which will lead to greater annual giving, major giving, and planned giving.

The Central Advancement Office has identified thousands of prospects, with the capacity to make major gifts. The VPIA is responsible for realizing that potential, by creating successful training and mentoring programs for major gift officers, and by establishing performance metrics and a culture of accountability with the chief advancement officers of the colleges and units. A key challenge for the VPIA is to raise the level of professionalism among the development officers across campus modeling successful fundraising behavior and by working closely with deans/directors.

CREATE AND MAINTAIN A HIGHLY SERVICE-ORIENTED CULTURE WITHIN THE CENTRAL ADVANCEMENT OFFICE

Given that the greater part of the advancement investment at the University is within the colleges and units, they are often the first point of contact between prospects and the University. To be successful, the Central Advancement Office must support and encourage the entrepreneurial spirit of the deans and directors, while maintaining best practices in the alumni and donor database, prospect management, donor stewardship and other support services. One of the challenges for the VPIA will be to maintain that service-oriented culture, while at the same time assuring best practices in prospect management that are seen as equitable and fairly administered.

The VPIA is responsible for fostering cooperative working relationships across the campus, for having the central office seen as consultative and adding value, and for understanding and supporting the differing needs of each college and unit. Some colleges/units have fully mature development offices and practices, while others are earlier in the process of developing advancement programs.

ENSURE THE ONGOING COORDINATION OF DEVELOPMENT AND ALUMNI RELATIONS FUNCTIONS

Under the VPIA, Development and Alumni Relations will coordinate to ensure these functions complement one another. Understanding that their constituencies are overlapping, but not identical, the VPIA must provide leadership to initiate combined programs and directions for these units to maximize the strengths of both, using benchmarking from the most successful combined development/alumni relations programs at comparable research universities as a tool for best practices at Utah.

BUILD AND LEAD A TEAM OF HIGH-PERFORMANCE DEVELOPMENT PROFESSIONALS

The VPIA must bring strong entrepreneurial and institution building instincts and understand how to attract and retain a sophisticated fundraising team with a service orientation. A priority for the Vice President will be to recruit, train, and reward a high functioning team that will provide the full spectrum of advancement services for the colleges. The VPIA is responsible for building that culture, and for assessing and analyzing staff performance, and measuring performance against goals and objectives.

ENSURE THAT THERE IS AN APPROPRIATE ADVANCEMENT INFRASTRUCTURE

The VPIA will ensure that an appropriate and effective infrastructure exists to carry the University forward. Streamlining and improving services such as gift processing, acknowledgement, and receipting, as well as prospect research, management, and stewardship, will be an ongoing effort. The VPIA is expected to bring a clear understanding of best practices in these areas. He/she will provide leadership in the selection and implementation of the best support systems. The University is currently migrating from the Advance database management system, to a new CRM system based on a Salesforce platform. Ensuring a smooth and successful transition from Advance to the new system will be one of the VPIA's early assignments.

SERVE ON THE PRESIDENT'S CABINET AS AN INSTITUTIONAL LEADER

As a member of the President's Cabinet, the VPIA will be involved in campus-wide decisions. Of particular importance, the VPIA will provide advice and make recommendations on issues that affect the entire University from the perspective of the donor and alumni communities.

QUALITIES AND QUALIFICATIONS

The University seeks an outstanding leader in the advancement field with proven success in fundraising, particularly in principal gifts, alumni relations, and capital or comprehensive campaigns. The successful candidate will demonstrate extensive expertise in all areas of development, a commitment to and knowledge of higher education, and experience in building and leading high performing development teams. The successful candidate will be comfortable with a variety of cultures, demonstrating respect and tolerance.

The ideal candidate will possess:

- Inspiring and clear communication skills, able to establish strong relationships with staff, faculty, donors, alumni, the business community, government and other constituencies;
- The ability to articulate the University of Utah's mission, vision, needs, and aspirations with enthusiasm and clarity;
- The ability to understand and work effectively within the complexities of a major research university;
- Experience with alumni relations including the coordination of alumni functions with development efforts;
- Integrity and high ethical standards;
- Strong analytical and strategic planning skills;
- Creativity and a willingness to explore new ideas and approaches;
- The ability to motivate and lead people through change;
- A commitment to efficiency and performance;
- Global knowledge and local understanding;
- A commitment to intellectual development and academic pursuits.

Minimum qualifications will include:

- Bachelor's degree from an accredited institution of higher education required; Masters preferred;
- At least 10 years of progressively more responsible experience in advancement, with a proven track record of success at the college or institutional level;
- At least five years of experience in higher education, at a comprehensive institution with at least 10,000 students preferred;
- Experience holding a major role, including securing seven-figure gifts, in a comprehensive campaign of at least \$250M.

PROCEDURE FOR CANDIDACY

Interested parties should apply by October 7, 2018. Applications should include a letter of interest, curriculum vitae, and references with email addresses and telephone numbers. All applications, nominations, and inquiries will be held confidential. References will not be contacted without prior authorization from applicants. Application review will begin immediately. Initial interviews are expected to occur in mid-October

Confidential inquiries and nominations should be directed to Summit Search Solutions, Inc.:

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To apply and submit your CV and letter of interest (PDF format please) please visit:
<https://theapplicantmanager.com/jobs?pos=su117>

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