



**Search for the Senior Director of Principal and Major Gifts
The Morton Arboretum
Lisle, Illinois**

THE SEARCH

The Morton Arboretum (the Arboretum), globally recognized for its century-long commitment to tree-focused science, conservation, and education, seeks an experienced and strategic leader to serve as the inaugural Senior Director of Principal and Major Gifts (Senior Director). In this newly created and elevated role, the Senior Director will join at an exciting moment of growth and transformation as the Arboretum makes significant investments to grow the development enterprise. The Senior Director will provide vision and leadership of a comprehensive and well-integrated major and principal gifts fundraising program for the Arboretum as part of its annual fundraising strategy and in preparation for a multi-million-dollar comprehensive campaign.

For more than a century, the Arboretum has played an increasingly prominent leadership role as a place that shares meaningful scientific research, leads conservation work, and reimagines a world where people and trees thrive together. Its 1,700 acres of beautiful tree-lined landscapes located 25 miles west of downtown Chicago are a place of enjoyment, a vibrant hub for nature education, and a world-renowned center for scientific research that studies trees and how to sustain them. More than 400 employees have chosen to advance the Arboretum's mission and are committed to inclusion, responsible stewardship, collaboration, continuous learning, and delivering an exceptional experience to patrons. For the last three years, the Arboretum has been named a "Top Workplace" by *The Chicago Tribune*. As a nonprofit organization, the Arboretum's mission is to collect, study, display, and conserve trees and other plants from around the world to inspire learning, foster enjoyment, benefit communities, encourage action, and enhance the environment.

As the Arboretum prepares to move into an ambitious comprehensive campaign with an anticipated goal of \$150 million, the Senior Director of Principal and Major Gifts will expertly lead a significant division within the organization's growing development enterprise. Reporting to the Vice President of Development (VP), Kathleen Spiess, the Senior Director will serve as a contributing member of the Arboretum's development leadership team, helping identify and advance shared goals for fundraising as well as other institutional priorities. Leading by example, the Senior Director will manage an externally focused portfolio of individual donors and prospects to secure restricted and unrestricted gifts, while

overseeing and building a team of high-performing gift officers responsible for devising and executing plans to qualify, cultivate, solicit, and steward donors, thereby growing the Arboretum's pipeline of individual donors making major and principal gifts.

The Arboretum welcomes applications from exceptional leaders who understand the positive impact of protecting the environment and with experience in similarly complex institutions. Isaacson, Miller, an international search firm, is assisting the Morton Arboretum in this important recruitment effort. As indicated at the end of this document, all inquiries, nominations, and applications should be directed in strict confidence to the search firm.

ABOUT THE MORTON ARBORETUM

History

The Arboretum was founded in 1922 by Joy Morton, founder of the Morton Salt Company and son of the founder of Arbor Day. "Plant Trees" was the Morton family motto, and its legacy carries on to this day through the Arboretum's mission and programs. Mr. Morton established his country estate in Lisle, Illinois in the early 1900s as a respite from the bustle of the Chicago industrial scene 25 miles away. Between 1909 and 1921, Mr. Morton focused on transforming the property into an arboretum, and in 1922, the Morton Arboretum was formally established, with members of the Morton family and Morton Salt executives appointed to life terms on the Board of Trustees. When Mr. Morton passed away in 1934, the Arboretum consisted of 735 acres and many plantings and nurseries, an extensive system of roads and paths, and a small but mighty staff developing and overseeing a general landscape plan.

Strategic Vision

The Morton Arboretum envisions a greener, healthier, and more beautiful world where people and trees thrive together. To achieve this vision, the Arboretum has identified three interlinked strategic priorities:

- People and communities are engaged and inspired.
- Knowledge is advanced through collaborative scientific inquiry.
- Trees are protected, preserved, and supported.

A key component of the new [strategic plan](#) is the Arboretum's continued partnership and engagement with a range of audiences and perspectives. The Arboretum seeks to welcome a diversity of community members to engage with its mission and programs onsite, in addition to engaging audiences virtually and in their communities regionally and globally. The Arboretum is committed to hiring employees, electing trustees, and attracting volunteers representing the broader public, through which the Arboretum will gain enriched perspectives to inform its objectives.

Organization and Programs

In 2022, the Arboretum celebrated its first century of mission impact. Today, the Arboretum encompasses 1,700 acres of woodlands, prairie, lakes, and streams, with plant collections and specialty gardens amid natural landscapes. In addition, the Arboretum is home to 16 miles of hiking trails and nine miles of paved roads for driving, bicycling, and guided tram tours. The organization attracts more than one million visitors annually from across the nation and world and has 58,000 member households. The Arboretum is operated by a team of staff and volunteers, including 230 full-time, 135 part-time, 120 temporary employees, and 900 volunteers.

Plant Collections

The Arboretum grows and displays a rich diversity of trees, shrubs, and other plants that are evaluated for their suitability for the midwestern United States. These living collections include 222,000 plant specimens representing 4,100 different kinds of plants. Arranged by geographic, taxonomic, and other special groupings, the collections are enhanced by restored natural areas of native plants and ecosystems. The Arboretum's work in new plant development results in useful and attractive trees and shrubs that are introduced in the marketplace.

Science and Conservation

The Arboretum is globally recognized for its leadership in developing leading-edge solutions in tree science and research. [The Center for Tree Science](#) (the Center) is the hub of this important work, where a team of scientists with expertise in tree biology, ecology, evolution, conservation, and the cultivation of trees and shrubs develop a deep understanding of trees and what makes them thrive. The Center engages scientists worldwide through its [Collaborative Network](#), which encompasses scientific colleagues from gardens, universities, industries, and organizations. These scientists share their expertise with the Arboretum through special relationships established between the Arboretum and their home institutions. The Arboretum also has an herbarium with a collection of 205,000 dried specimens that are used for botanical research.

In addition to research, the Arboretum advances tree conservation. Through the [Global Tree Conservation Program](#), the Arboretum leads partnerships and assists efforts to prevent tree extinction and secure threatened tree species, with a focus on oaks. In March 2023, the [Species Survival Commission](#) (SSC) of the [International Union for Conservation of Nature](#) (IUCN), the world's largest conservation organization, designated the Morton Arboretum as the first *Center for Species Survival: Trees*. Only 11 centers are recognized globally by the IUCN SSC, five of which are in North America.

Learning, Engagement, and Outreach

The Arboretum's [Learning and Engagement](#) division provides programming for guests of all ages, including Little Trees, a nature-based early childhood learning program. Educational programs for adults include in-person and online classes in gardening and plant care, conservation, and tree and nature-related topics, in addition to art, photography, and other classes.

The Arboretum also offers science-based advice about trees, plants, and landscapes to amateur and professional gardeners and landscapers throughout the world through the [Plant Clinic](#), which answers thousands of inquiries annually about plant care and selection.

The [Sterling Morton Library](#) has collections mainly focused on botany and horticulture, with a wide range of resources from highly scientific works to general gardening guides and a robust children's collection.

The Arboretum's four-acre [Children's Garden](#) encourages hands-on learning through immersive play in a tree-filled setting. The Arboretum also hosts Summer Science Camps, nature-based early learning classes, and other programs for children.

The Arboretum leads the [Chicago Region Trees Initiative](#), a partnership for coordinated action to improve the health, diversity, and equitable distribution of trees in the Chicago region to benefit people and communities. The Arboretum's outreach not only focuses on the Chicago region, but also expands globally through programs like [ArbNet](#), an interactive professional community of arboreta and an arboretum accreditation program. Launched in 2011, ArbNet now includes more than 2,000 institutions from 40 countries.

Leadership

In 2022, [Jill Koski](#) was named the President and CEO of the Arboretum. She was elected as the fourth leader in the Arboretum's 100-year history and the organization's first female leader. Koski came to the Arboretum from Holden Forests and Gardens in Ohio, where she was President and CEO from 2017 to 2022. Prior to that, she was Vice President of Development at the Arboretum for a decade. Her prior experience includes leadership roles in science-focused environmental nonprofits, namely the John G. Shedd Aquarium and the Peggy Notebaert Nature Museum in Chicago.

The Arboretum's [Board of Trustees](#) is responsible for the overall governance of the institution and the advancement of its mission. Comprised of corporate and civic leaders, trustees are elected to their roles. Additionally, a Board of Advisors provides guidance and perspectives to the leadership of the Arboretum around strategic matters related to its mission and work. The Board of Trustees is currently led by Robert J. Schillerstrom.

Fundraising Overview

The Arboretum has grown and flourished for more than a century with the generous help of donors who care about trees, people, and communities. For the fiscal year ending December 31, 2023, the Arboretum raised more than \$17.7 million in contributed revenue. Of this figure, \$8.8 million came from private philanthropy, \$2.4 million from government grants, and \$6.5 million from membership dues. The Arboretum's development team comprises 30 staff members but is poised to grow to upwards of 40 staff throughout 2025 in preparation for the upcoming comprehensive campaign.

Learn more about the Arboretum's financial and fundraising report in the [2023 Perennial Report](#).

THE ROLE OF THE SENIOR DIRECTOR OF PRINCIPAL AND MAJOR GIFTS

As a senior leader within the development enterprise, the Senior Director will provide the vision and strategic direction for principal and major gift fundraising during an exciting time of growth and momentum for the Arboretum. This individual will effectively engage with key constituents across the Arboretum and advise in the development of coordinated strategies aimed at maximizing the lifetime engagement of the Arboretum's most dedicated supporters. The Senior Director will also help provide strategic leadership for fundraising efforts around organizational and campaign initiatives. The Senior Director will oversee a team of four in the roles of Director of Major Gifts, Major and Planned Giving Officer, Major Gifts Officer (to be hired), and Major Gifts Associate (to be hired).

Essential Functions:

- Set annual fundraising goals and monitor team progress, providing strategy and tracking metrics to ensure effective portfolio management. Create balanced gift officer portfolios and track qualification, cultivation, solicitation, and stewardship activities to ensure continual development of the pipeline.
- Deploy analysis, experience, and intuition to qualify, cultivate, and solicit a portfolio of 60 highly rated donor prospects in the \$250,000-plus range.
- Actively engage the President, Vice President of Development, trustees, senior leadership, colleagues, and other high-level donors or volunteers in the cultivation, solicitation, and stewardship of donors and prospects.
- In partnership with development colleagues, support a comprehensive giving program that best matches donor capacity and interest with appropriate giving channels and engagement opportunities. Working across the organization, identify and package fundable projects to create a full complement of giving opportunities.
- Manage and ensure the integrity of regular reporting on goal achievement to demonstrate progress, identify areas of concern, and revise strategies as needed, including effective budget management. Ensure a consistent flow of prospects up and down the pipeline.

- Partner with the Director of Campaigns and Stewardship on the creation of unique donor cultivation and stewardship opportunities that advance campaign initiatives.
- Demonstrate alignment with the Arboretum's employee core values to be inclusive, take ownership, work together, keep learning, and make the Arboretum exceptional.
- Other duties as assigned.

Supervisory Responsibilities:

- Serve in a supervisory capacity of four employees, when fully staffed, providing leadership guidance and communicating the organization's goals. This includes:
 - Hiring, training, coaching, and developing team members by providing recognition and feedback and evaluating performance.
 - Ensuring that team members adhere to the Arboretum's policies and procedures and maintaining a safe and complaint work environment.
 - Building and maintaining positive working relationships with team members, colleagues, and other constituents to foster a collaborative and supportive work environment.

Qualifications:

- A minimum of ten years of proven achievement in a nonprofit fundraising program or related field.
- Direct experience in strategy development and success in the cultivation and solicitation of major gifts from individuals at the \$250,000-plus level.
- Proven ability to successfully motivate, engage, and interact with senior leadership, trustees, high-level donors, and volunteers.
- Supervisory experience of gift officers, including setting metrics, promoting professional development goals, and managing toward successful outcomes.
- Prior experience and proven effectiveness in moves management processes.
- Excellent verbal and written communication skills.
- Proficiency with Microsoft Office and experience using database systems, with prior experience using Raiser's Edge software strongly preferred.
- A valid driver's license, which is subject to insurability, and an annual Motor Vehicle Record (MVR) report.
- A bachelor's degree.

Success Factors:

- A commitment to, and ability to effectively convey, the Arboretum's mission with genuine passion, and the willingness to continually learn about the programs and mission.
- A persistent and confident approach to raising donor sights, articulating aspirational goals and ideas, and presenting philanthropic priorities.
- Superb leadership qualities, coupled with skilled planning and organizing skills.
- Keen knowledge of and comfort with analyzing and acting on data and metrics.

- A high degree of emotional intelligence and proven ability to work with individuals from all stations of life.
- Ability to discern and respond to donor interests to meet both donor and institutional goals.
- The professional credibility, maturity, and collaborative skills to garner the trust and confidence of senior staff, trustees, colleagues, and volunteers.
- Ability to manage multiple priorities effectively.

Compensation:

The expected hiring range for this position is \$180,000-190,000.

To attract and retain the best staff, the Arboretum offers a generous, comprehensive [benefits package](#) as part of overall compensation.

APPLICATIONS, INQUIRIES, AND NOMINATIONS

The Morton Arboretum has retained Isaacson, Miller, an international executive search firm, to assist with this search. Review of applications, nominations, and expressions of interest will begin immediately and continue on a confidential basis until an appointment is made. Applicants should send a cover letter and resume or curriculum vitae. Nominations, applications, and inquiries should be sent electronically and in confidence to:

Jack Gorman, Partner
Nicole Poe, Managing Associate
Sandeep Kaur, Senior Search Coordinator

<https://www.imsearch.com/open-searches/morton-arboretum/senior-director-principal-and-major-gifts>

The Morton Arboretum is a champion for diversity, supporting a culture of inclusion that attracts, inspires, and engages people to achieve success. The Arboretum is committed to hire and develop employees based on job-related qualifications irrespective of race, religion, color, national origin, sex, sexual orientation, gender identity, age, disability, or veteran status. To increase diversity in professions related to the public garden realm, we encourage applications from underrepresented minorities, persons with disabilities, and veterans.

The Morton Arboretum is dedicated to complying with its obligations as an equal opportunity/affirmative action employer. All applicants are guaranteed equal consideration for employment.