



***Search for Senior Philanthropic Advisor – New York Tri-State Based
Elon, North Carolina***

THE SEARCH

Elon University seeks a strategic, experienced and aspirational New York Tri-State based Senior Philanthropic Advisor for principal and major gifts to join its advancement and external affairs team. This is a new role within Elon's advancement and external affairs team. Over the last few decades, the University's advancement apparatus has grown and become increasingly sophisticated in its approach and strategies as Elon's profile has increased nationally. The Senior Philanthropic Advisor will join an advancement team that continues to better engage alumni, raise philanthropic resources, and compellingly narrate Elon's story. They will join an advancement team, and moreover a University community, that is ambitious in its goals and highly collaborative in charting the next stages of Elon's history.

The position reports to the Associate Vice President for University Advancement, will engage and advise the Senior Vice President for University Advancement and External Affairs and the President of the University, will serve as a key senior member of advancement's leadership team.

The Senior Philanthropic Advisor will be an experienced philanthropic strategist and fundraiser who employs a donor-centric model to identify, qualify, cultivate, solicit and steward gifts at the six-, seven-, and eight-figure level. As a front-line fundraiser, the Senior Philanthropic Advisor will maintain a portfolio of 100-125 prospective donors and will be expected to incorporate best practices of successful higher education gift offices. They will closely collaborate with leadership of University Advancement, including staff serving in major gift, planned giving, alumni engagement, parent engagement, research and prospect management roles.

The Senior Philanthropic Advisor will reside in New York City or the greater Tri-State area and will possess a deep understanding of the philanthropic ecosystem in the region. They will be expected to travel to the Elon campus 4-6 times a year, particularly during key moments such as (but not limited to) university move-in weekend, homecoming, family weekend, commencement, University Advancement strategic retreats, and more.

Elon University has engaged the search firm Isaacson, Miller to assist with this recruitment. Instructions for applying, nominating and inquiring about this opportunity can be found towards the end of this document.

Elon University

Elon University is the nationally recognized leader in engaged, experiential learning that prepares graduates to be creative, resilient, ambitious and ethical citizens of our global culture. With an intentional focus on outstanding teaching and hands-on learning, an Elon education involves mentors and peers who connect the dots between knowledge and the impact it can make. This distinct approach to teaching and learning is why *U.S. News & World Report* consistently ranks Elon No. 1 in the nation for undergraduate teaching.

The University offers an array of undergraduate and graduate degrees through six academic units: the College of Arts and Sciences; Martha and Spencer Love School of Business; School of Communications; Dr. Jo Watts Williams School of Education; School of Law; and School of Health Sciences. Elon currently enrolls approximately 7,300 undergraduates and graduate students and 502 fulltime faculty. Elon receives more than 18,500 applications for admission for a first-year undergraduate class size of approximately 1,600. Elon's primary admissions markets are in the Mid-Atlantic and Northeast. Other emerging states outside Elon's traditional markets include Illinois, Texas, Colorado and California.

Elon's current strategic plan, *Boldly Elon*, guides the University's priorities and goals. The plan includes 62 initiatives organized around the four themes of LEARN, THRIVE, CONNECT, and RISE. The University is governed by a 38 member board of trustees that includes alumni, parents and advocates for Elon's mission.

Current Leadership

Connie Ledoux Book, Ph.D.

Dr. Connie Ledoux Book is a passionate advocate for higher education and its power to transform students' lives. She spent 16 years as an Elon University faculty member and administrative leader, helping to build the university's reputation for excellence in engaged teaching and learning. In 2015 she accepted a groundbreaking role as the first female provost and chief academic officer at The Citadel, the Military College of South Carolina. Following her impressive accomplishments there, she returned to Elon as president in 2018, bringing a deep appreciation for the university's unique history and its rapid rise to national prominence.

Under President Book's leadership, Elon has been annually ranked by U.S. News & World Report as the #1 national university for excellence in undergraduate teaching and the nation's leader in eight "programs that enhance student experience."

In 2020, President Book led creation of the 10-year Boldly Elon strategic plan to advance the university's national leadership in experiential education, mentoring and student success. The university has established innovative new academic programs in engineering, nursing, science and technology, expanded programs to promote health and wellness and invested in new programs to support inclusive excellence, faculty and staff, and alumni engagement. New facilities include the Innovation Quad for engineering and sciences, Schar Center (a 5,000-seat convocation center and sports arena), Sankey Hall, Koenigsberger Learning Center, East Residential Neighborhood, LaRose Student Commons, and The Inn at Elon, an on-campus hotel.

In 2024 Book led the historic establishment of an Elon campus in Charlotte, North Carolina, the state's largest metropolitan area. The facilities house the new part-time Flex Law program of Elon University School of Law, along with undergraduate programs in sport management and summer study programs that are part of Elon's Study USA opportunities.

Book spearheaded the successful *Elon LEADS* comprehensive campaign, raising \$260 million for endowed scholarships and engaged learning scholarship funds, eight new facilities, three new professorships, and an endowment for the Dr. Jo Watts Williams School of Education with support of the largest single gift in Elon history.

Book has a doctorate from the Grady College of Journalism at the University of Georgia, a master's degree in education administration and supervision from Northwestern State University (Louisiana) and a bachelor's degree in journalism from Louisiana State University.

James Piatt

James Piatt serves as Senior Vice President University Advancement and External Affairs at Elon University. He has served Elon since 2008, when he joined the advancement team as Vice President for University Advancement. He has led Elon through two campaigns, the *Elon LEADS Campaign*, a \$260 million comprehensive campaign concluded in December 2022, and the *Ever Elon Campaign*, a \$107 million effort completed in December 2011.

During his tenure at Elon, the University's annual fundraising production has tripled, the university's endowment has grown from \$83 million to \$354 million, more than 400 endowed scholarships have been created, 15 new campus facilities have been fundraised, the number of alumni donors has doubled, and parent annual giving participation has advanced from 26% to 42%.

Prior to joining Elon, Mr. Piatt served eight years as Vice President for Advancement at Mount Union College in Alliance, Ohio, where he successfully directed an \$82 million campaign. Earlier in his career, he served as Associate Director of Development at the Law School at Stanford University, Development Director for the Humanities and Social Sciences at the University of California, Berkeley, and Assistant Dean for Development in the College of Communications at Ohio University.

Mr. Piatt received his MBA from Ohio University in 1993 and his Bachelor of Science degree in Journalism from the E.W. Scripps School of Journalism at Ohio University in 1987.

Brian Baker

Brian Baker is the Associate Vice President for University Advancement and Director of Principal Gifts. He leads a team of people in the areas of Major Gifts, Planned Giving, Presidential Stewardship, Campaign Operations, Prospect Research and Corporate and Foundation Relations.

Baker joined Elon as a Major Gifts Officer in September 2005, and later served as Director of Major Gifts, and Executive Director of Major and Planned Giving. Before joining Elon, Baker spent five years at the University of Louisville, first in athletics and then as Associate Director of Development for the College of Arts and Sciences.

In March 2013, Baker was recognized by The Triad Business Journal as one of its Top 40 under 40 business leaders. He is a 2000 graduate of Wake Forest University, where he earned a bachelor's degree in communications and minored in journalism. He lives in Burlington, N.C., with wife Katy and their three children, Jack, Andrew, and Caroline

More information about Elon can be found at www.elon.edu or in the addendum section of this document.

University Advancement and External Affairs

The division of University Advancement and External Affairs of Elon University is comprised of several key external-facing units of the university charged with fostering enthusiasm for Elon among students, alumni, parents and friends, effectively telling the Elon story, and encouraging and stewarding inspired support toward priorities that advance Elon's mission and strategic vision.

The functional areas in the division include Major and Planned Gifts, Corporate and Foundation Relations, Alumni Engagement, Parent Engagement, Annual Giving, Advancement Services, Donor Relations, Prospect Management and Research, Career Services (Student Professional Development Center), Cultural and Special Programs, National Campuses, and Continuing Education and Professional Development.

Elon concluded the seven-year *Elon LEADS* comprehensive campaign at the end of 2022, raising a record \$260 million from more than 34,000 donors. The campaign was organized around four priorities, expanding scholarships, growing resources for engaged learning programs, investing in faculty and staff development and providing new facilities on the university's iconic campus.

Elon fundraising continues to gain strong support among all constituencies, with especially generous support from trustees, parents and faculty and staff members. The university's exceptionally young alumni body provides strong annual giving participation, with a #21 ranking for alumni support according to *U.S. News and World Report*.

The Role of Senior Philanthropic Advisor

Reporting to the Associate Vice President for University Advancement, the Senior Director of Development for Principal Gifts must work independently and collaboratively to perform the following essential duties and responsibilities:

- Maintain a portfolio of 100-125 donor prospects, demonstrating frontline fundraising success by personally raising gifts in support of Elon's strategic fundraising priorities, focusing on donors with a capacity at six-, seven- and eight-figures.
- Personally identify, qualify, cultivate, solicit, and steward a select portfolio of donors and prospects with added focus on pipeline development to meet an increasingly ambitious strategic direction of Elon University. Identification of prospects includes a heightened focus on developing meaningful connections with high net worth prospects that include but are not limited to alumni, parents, friends, foundations, and organizations.

- Employing best practices of donor-centric higher education advancement work, develop meaningful relationships with donor prospects that will lead to their consideration of impactful philanthropic proposals.
- Through collaboration across campus, develop inspiring proposals that will have clear, unmistakable impact on the students, staff, faculty and programs of Elon.
- Build and maintain strong relationships within the Elon community, including faculty, staff, and administration, and be an active member in the life of the university, committed to the mission and values of Elon University.
- As a senior leader, assist in efforts to enhance Elon's institutional image and visibility; communicate a strong and consistent message about Elon to all constituencies.
- Build and present public presentations; manage and monitor expenses; develop prospect strategies and execute action-oriented plans; develop and communicate activity reports; communicate with clarity.
- Promote planned giving and effectively communicate their value as vehicles for philanthropic impact.

Qualifications and Characteristics

- A bachelor's degree is required; a master's degree is preferred.
- A minimum of 10 years (preferably more) of relevant experience, preferably in principal gift-level fundraising at an institution of higher education. Preference will be given to candidates who have demonstrated a history of progressive leadership and responsibility based on their success.
- Experience leading projects and/or developing philanthropic proposals within a complex organization; and demonstrated ability to clearly articulate complex concepts into relatable and understandable ways.
- A strong track record of thought leadership and strategic engagement with senior-level leaders within an organization; along with demonstrated ability to think strategically, act collaboratively, communicate effectively, and move quickly.
- Demonstrated ability to raise donor sights, articulate aspirational goals and ideas, set priorities, present philanthropic opportunities, and close gifts.
- Creative and entrepreneurial spirit with strong intellectual curiosity.
- Professional credibility and integrity, intellectual depth, maturity, wisdom and collaborative skills to earn trust and confidence.
- Excellent written and verbal communications and strong interpersonal skills.
- Ability to foster inclusiveness and diversity of ideas.
- Tolerance for ambiguity and ability to adapt quickly and effectively.

Location

This position is based in the New York Tri-State area with the expectation of traveling to the Elon campus for critical events and meetings.

Applications, Inquiries, and Nominations

Screening of complete applications will begin immediately and continue until the completion of the search process. Inquiries, nominations, referrals, and resumes should be sent via the Isaacson, Miller [website](#).

Jack Gorman, Partner

Kahn Lee, Managing Associate

Lisa Clayton, Senior Search Coordinator

Elon University is an equal employment opportunity employer committed to a diverse faculty, staff and student body and welcomes all applicants.

ADDENDUM

The Elon Story

The leaders of the small Southern Christian Church denomination who founded Elon College in 1889 risked everything because of their belief in the power of higher education. They named the school Elon, the Hebrew word for oak, because it was built in a grove of oak trees, a perfect metaphor for the enterprise of growing strong young minds. William S. Long, the school's first president, sold his family farm to fund construction of the main building, including classrooms, faculty offices and the library. The building was destroyed in an early morning fire on January 18, 1923, a calamity that came to define the character of the institution. By that afternoon, plans were in place to hold classes the following day and begin reconstruction.

These were people of resilience, faith and undying commitment to the education of the mind, body and spirit. They understood that life is about continual transformation. They also believed strongly in openness of intellectual inquiry – Elon was among the few schools founded as co-educational institutions. Those bedrock values endured and served the college well through a financial crisis during the Great Depression and many lean years in the three decades that followed.

Elon's emergence as a national university has taken place under the leadership of four presidents: Earl Danieleley (1957-73), Fred Young (1973-98), Leo M. Lambert (1999-2018) and Connie Ledoux Book (2018-today). They have been partners in charting Elon's growth with committed trustees, and a fully involved community of faculty, staff, students, parents, alumni and friends. Their unifying values can be traced back to the bedrock principles of Elon's founders.

The Leader in Engaged Learning

Elon's rise to national prominence has been driven by its active, experiential approach to teaching and learning. Students form close, personal relationships with their faculty and staff mentors and the priority is on hands-on learning experiences. One-on-one, mentored research is common, and student-faculty engagement spaces and labs are always buzzing with activity. Classroom instruction is integrated with the entire campus experience and extended around the world through internships, study abroad and service. Ask any member of the community what Elon is all about, and the answer you're most likely to hear is "engaged learning."

Elon's ethos of student success has engendered a remarkably close-knit and supportive community. From weekly College Coffee gatherings on Phi Beta Kappa Commons, to more than 240 active student organizations, to traditional events such as the holiday Festival of Lights, Elon exudes collegiality.

With such a cohesive and respectful environment, it is natural that Elon is deeply committed to inclusion and diversity in all its forms. This is a community that welcomes and supports people of all races, faiths, socioeconomic backgrounds, ethnicities and nationalities, abilities, gender identities, sexual orientation and intellectual perspectives. As in any community in today's world, there are occasional tensions. However, the people of Elon are inspired to find and implement solutions. Civic engagement is robust as students, faculty and staff partner with agencies in local neighborhoods and around the world to help build a better tomorrow.

Academics

Thirty years ago, before engaged learning was identified as a best practice, Elon was a pioneer. Students in the early 1990s responded eagerly to an active, experiential approach to their studies, integrating classroom study with experiences in the wider world. The curriculum was overhauled, with classes extended to four hours, allowing time for presentations, group projects, excursions and experimentation. Elon adopted an Experiential Learning Requirement, engaging students in five co-curricular Elon Experiences that have become signature programs of an Elon education: study abroad, undergraduate research, service, internships and leadership. Students are required to complete two of the experiences. An Elon Experiences Transcript was developed to document these learning experiences along with the traditional academic transcript. Over years of refining and improving these programs, Elon gained a reputation as the nation's leader in engaged learning.

The most notable recognition has come in the past several years in the annual U.S. News & World Report feature on the eight "Programs to Look For" that "promote student success." Elon leads the nation, with recognition for excellence in all eight categories: study abroad, undergraduate research, internships/co-ops, learning communities, service learning, writing in the disciplines, senior capstone and first-year experiences. The ranking is based on a survey of higher education leaders and demonstrates the high regard that exists for Elon's engaged learning programs.

The appeal of engaged learning has only strengthened in an age when students seek to put knowledge into practice. Check in with students in the game design capstone course and find out about the games they've published on Steam, meet the latest class of the Elon Year of Service Fellows who will focus a yearlong effort on the health and well-being of Alamance County, or learn about the students and faculty in the Poverty and Social Justice Program who worked with local residents of an underserved community to create a community garden. The spring is a great time to visit Elon's Maker Hub and see the robotic cat or other creative projects inspired and funded by Elon's Kickbox program. At the annual Spring Undergraduate Research Forum you can see poster presentations and talk one-on-one with the dozens of students who present their work at the National Council on Undergraduate Research (NCUR) conference.

The centrality of the arts and sciences is a second pillar of the Elon academic model. A strong Core Curriculum required of every undergraduate challenges students to think broadly, critically and creatively across many disciplines. They explore ideas that challenge their views, and do extensive writing in their respective disciplines. These skills will serve them well throughout their careers and create an appreciation for lifelong learning.

The establishment of a chapter of Phi Beta Kappa at Elon in 2010 was an institutional milestone, capping a decade-long investment in the arts and sciences. Elon raised expectations for academic rigor, increased investments in faculty development, reinstated a foreign language requirement, expanded library and learning resources, reinvented the Honors Program and built the Academic Village, a quad for the arts and sciences. Students in every major benefitted from the effort, known on campus as "the journey to Phi Beta Kappa."

Student Life

Elon is a residential university and seeks to integrate fully the academic, residential and social experiences of students. In making major investments in residential facilities, Elon has created eight neighborhoods that orient and ground students intellectually and socially, including living-learning communities, affiliated faculty and staff, residentially linked courses, classrooms in residence halls, common social spaces and unifying traditions. Elon's 20 living-learning communities (LLCs) are annually recognized among the nation's finest. Students, faculty and student life staff work together to create an integrated learning environment that blends the classroom and residential experiences.

In 2022, Elon launched the HealthEU initiative, a broad-based effort to connect students, faculty and staff with resources to support their wellness and well-being. HealthEU is organized around six dimensions of well-being: community, emotional, financial, physical, purpose and social. These dimensions were identified through a campus-wide focus on health and well-being starting with the Presidential Task Force on Social Climate and Out-of-Class Engagement and continuing with the Student Wellness and Well-Being Work Group and the JED Campus project. Now in its second year, HealthEU is expanding its outreach and planning is under way for a facility to serve as a comprehensive campus wellness hub.

Elon's Financial Model

Elon is a classic example of the tuition-dependent private institution. The Board of Trustees and the administration have followed a financial model that can be summarized as "low tuition/low discount." This is the opposite of the prevailing model at many schools that publish a high "sticker price" and then award a significant portion of tuition revenues as unfunded scholarships. The national average for tuition discounting is about 54 percent, while Elon's unfunded discount rate is currently below 30 percent. Elon's low discount rate has allowed for strong investments in academic quality and kept the focus on growing the number of donor-endowed scholarships.

Because of its relatively low costs in the 1990s, Elon has been able to increase tuition while maintaining its "best-value" position. Elon has also grown its student body while maintaining a low student-faculty ratio and small class sizes. Over the past 30 years, the undergraduate population has doubled in size to 6,500 students. The twin strategies of enrollment growth and increased tuition, combined with an increase in fundraising and wise investment strategies, have contributed to the university's strong financial position.

Elon takes a conservative financial approach, with both board-mandated and university-mandated reserves established within the budget. These reserves provide flexibility, allowing the university to take advantage of new opportunities and to maintain planned spending levels when there are unexpected economic challenges.

Inclusive Excellence

Elon values and celebrates the diverse backgrounds, cultures, experiences and perspectives of our community members. We embrace diversity in its broadest sense, including, but not limited to, diversity of age, disability, ethnicity, gender, gender identity, nationality, race, religion, sexual orientation, socioeconomic standing and intellectual viewpoint.

Elon's Division of Inclusive Excellence was established in 2020 with the goal of sustaining a diverse, equitable and inclusive community; maintaining a culture of health and well-being on a vibrant residential campus; and championing Elon's exceptional faculty and staff.

Phoenix Athletics

Transitioning to NCAA Division I in 1999, Elon currently has over 400 student-athletes competing in 17 sports. Elon has been a member of the Coastal Athletic Association (CAA) since 2014 and has had broad based athletic success in the conference, winning 19 league championships across eight sports. For each of the past eight years, Elon has finished first or second in the CAA in NCAA Graduation Success Rate and has ranked in the top three across the conference in the NCAA Academic Performance Rate (APR). In alignment with the university's mission that emphasizes student opportunities to study abroad, each of Elon's athletics teams participate in a global experience once every four years.

Highlighted by the opening of the Schar Center in 2018, home to basketball and volleyball, Elon's athletic facilities are among the best in the country. Rhodes Stadium is consistently ranked among the most beautiful FCS football stadiums and Elon has hosted recent CAA and NCAA tournament contests at Latham Park (baseball), Rudd Field (soccer), Hunt Softball Park, the Jimmy Powell Tennis Center and Jerry & Jeanne Robertson Track & Field Complex.

The State and Region

Elon's location in the thriving Mid-Atlantic region is an asset for admissions recruiting and for employment opportunities for graduates. North Carolina's population grew by about 900,000 in the past decade and it is the ninth-largest state by population. Forbes ranks the state #1 for business, the 14th consecutive year of a top-five ranking in the magazine's annual publication. Recent new economic development announcements for the Triad region include Toyota's first North American battery manufacturing plant, a Boom Supersonic aircraft manufacturing plant and a Wolfspeed silicon carbide manufacturing center. The Piedmont Urban Crescent that follows Interstates 40 and 85 from Raleigh to Charlotte is a thriving business corridor, with extensive transportation and logistics infrastructure that serves the East Coast.

Higher education is a key factor in the state's robust economy, and North Carolina is ranked #3 in the nation for higher education by the personal finance company, SmartAsset. Elon is among the outstanding universities that produce a highly educated workforce and serve as an engine of research, innovation and entrepreneurship. Tier I research universities - Duke University, the University of North Carolina at Chapel Hill and North Carolina State University - are joined by three prestigious private institutions - Wake Forest University, Elon University and Davidson College - and many other public and private institutions in preparing students for success in a rapidly evolving economy. North Carolina offers an outstanding quality of life with a moderate climate, easy access to mountains, beaches and beautiful parks, a low cost of living and some of the nation's finest doctors and medical facilities.

Elon's campus is in a suburban setting in Alamance County, within a short drive of both the Piedmont Triad (Greensboro, Winston-Salem, High Point) and Research Triangle (Raleigh, Durham, Chapel Hill) metropolitan areas. The Town of Elon (pop. 11,400) that surrounds the campus is part of the Burlington, N.C., metropolitan area (pop. 170,000). The university maintains strong ties with local business and government leaders. Elon has especially strong relationships with the Alamance- Burlington School System and nonprofit organizations that partner with student volunteers who provide about 120,000 hours of service annually.