



**Position Statement for  
Vice President for Advancement  
Loyola Academy  
Wilmette, Illinois  
Start Date: August 31, 2023**



## OVERVIEW AND HISTORY

Loyola Academy is the largest Jesuit college preparatory high school in the United States. It was founded in 1909, is coeducational, grades 9-12, located on the North Shore of Chicago and currently enrolls 1,940 students. It draws students from 220 elementary and junior high schools throughout Chicago (41.6%) and its suburbs (58.4%). It has a storied history and enjoys a national reputation.

Loyola operates two campuses: the main academic and athletic campus is in Wilmette and the Munz Campus in nearby Glenview is sixty-five acres of athletic fields and settings for the Academy's natural sciences. Recent capital enhancements include the John D. Norcross '54 Aquatic Center, the Mary and L. Robert '62 Pasquesi Piazza, The McGrath Family Performing Arts Center, and Ellen S. and Peter G. Leemputte '78 Family Theater.

The Vice President for Advancement will work in close collaboration with administrators, faculty, and staff while reporting to President Fr. Greg Ostdiek, S.J. and serving on his executive leadership team.



## MISSION

***"Women and Men for Others."*** This is the motto for the school's mission: "To form women and men for meaningful lives of leadership and service in imitation of Jesus Christ through a college preparatory education in the Jesuit, Catholic tradition." *Cura personalis*, a Latin phrase meaning "care for the person" is at the core of the Jesuit mission. As one of the alumni (Ryan McCarthy '92, former Secretary of the United States Army) put it, "The motto of this school means something. It's not a bumper sticker. When you take care of other people, they will take care of you."





## VISION

Loyola Academy is a diverse and committed community responding to the God-given call to become women and men for others who are religious, intellectually competent, physically fit, loving, open to growth and committed to doing justice.

The school has over 25,000 alumni (14,709 reachable by email; 22,979 with an address) and its reach is broad and deep. The school recently completed its \$75 million *Our Second Century of Excellence* campaign as part of its implementation of the strategic vision. The school has a \$51 million endowment and financial aid of \$5.85 million (including a generous faculty/staff remission program) that accounts for over 13% of its \$40 million budget for 30% of the student body. The school has \$21 million of debt. Loyola will begin amortizing the debt in 2026 and pay it off by 2037.

Loyola Academy wishes to build and enhance its reputation as a nationally ranked school of excellence in all areas of endeavor including academics, athletics, and the arts. This position within the senior administrative team requires an individual who respects tradition but also has a bold vision for a school seeking its place in the 21st century as an educational powerhouse.

Loyola Academy's educational program emphasizes tradition and rigor. The new principal, Tim Devine '88, is committed to leading an experienced and dynamic faculty and staff with programming that is innovative, deep, and relevant. There are 187 faculty members, 89% who hold advanced degrees with 5% holding Ph.D./JD. Neighboring high schools include New Trier, Glenbrook South, Glenbrook North, and Regina Dominican.

The school is determined to meet the needs of a student population that is increasingly diverse, while preparing their graduates for the challenges of the 21st century. The school offers 24 AP courses, 52 Honors courses, and approximately 15% of the enrollment is in one of the two honors programs at the school. The **Dumbach Scholars**





## THE REGION

The campus is just minutes from the northern boundary of Chicago and close to the Northwestern University campus. Chicago is the third largest city in the United States and home to over 2.5 million residents. Owing to the city's motto ("*Urbs in horto*", or "City in a Garden"), there are more than 8,800 acres of green space and 600 parks along with 28 miles of lakefront with 24 beaches.

The area likewise offers a remarkable array of opportunities for visitors and residents alike, including more than sixty museums and cultural centers; eight major league sports teams; more than 200 theaters, 250 live music venues and 200 professional dance companies; 70 music festivals, 36 parades, over 40 film festivals; 59 historic districts; and more than 7,300 restaurants and over 160 breweries in the Chicagoland area. Loyola Academy is located near it all.

## GOVERNANCE

The governing body of Loyola Academy for 2023-2024 is the 26-member Board of Trustees, which has chief legal and fiduciary responsibility for the entire community. The current Board Chair is James P. Walsh '79 who is the Head of Corporate Development for BMO Financial Group. There are eight Jesuits who sit on the Board; nine alumni were on the 2022-2023 Board.

Fr. Gregory J. Ostdiek, S.J., is the Academy's ninth president. He did his undergraduate work at the University of Dayton, has his Master's in English from Pennsylvania State University and a Master's in Philosophy from Fordham, a Master's in Theology and

**Honors Program** is designed for students interested in the humanities. It is grounded in the philosophy of the Great Books Foundation's Shared Inquiry Method. The **Clavius Scholars Honors Program** is designed for students interested in math and science, emphasizing a critical appreciation of the scientific process.

The school offers 87 cocurricular clubs. The athletic program has 34 varsity sports with 85 teams. The school is in two of the most competitive conferences in the state of Illinois and the school has earned state championships in a variety of sports (football, basketball, softball, swimming, water polo, lacrosse, golf, hockey) for both girls and boys. College matriculation is impressive: 98% of the Class of 2022 are attending four-year colleges, with 58% going to private institutions and 42% to public colleges/universities (23% of that total going to Jesuit institutions).

The new President, Fr. Greg Ostdiek, S.J., and the Board wish to launch a transformational endowment campaign for faculty excellence, financial aid, and academic programming.

For more detailed information about the educational program, please visit the Loyola Academy's website at [www.goramblers.org](http://www.goramblers.org)



Th.M. in scripture from Boston College’s School of Theology and Ministry. He recently completed an Ed.M in educational policy and management from the Harvard Graduate School of Education and a MPA from Harvard Kennedy School of Government. Fr. Greg served twelve years as an officer specializing in nuclear engineering for the U.S. Navy (*USS John C. Stennis*) which included four deployments to the Arabian Gulf. He was ordained in 2019 and his program of service, ministry, study and prayer has included being a prison minister, teaching physics, coaching athletics, and serving in campus ministry. Fr. Greg succeeded Fr. Patrick McGrath, S.J. who served the Academy for 12 years and became pastor of Old St. Patrick’s in Chicago’s Loop in the summer of 2022.

Timothy P. Devine is the Principal of Loyola Academy. He has nearly 25 years of experience, including being the principal of Walter Payton College Prep for 9 years. During his time at Payton, it was ranked as one of the top twenty-five high schools in the country. Tim has a four-generational family history with Loyola Academy. He replaces Charlie Heintz who took a position in his hometown of New York City at Regis Jesuit HS on Park Avenue.



LOYOLA AT-A-GLANCE

Grades 9– 12; two campuses	1940 students (40% of color)
Tuition for 2023-2024	\$19,250 (there are additional fees for various programs)
Financial Aid	\$5.85 million (30% of students); includes faculty and staff tuition remission
2023-2024 Budget:	\$40 million
Overall Fundraising for 2022-2023 (YTD):	\$11,200,000 (one donor accounted for \$5 million; in 2021-2022 the three largest donors: alum, \$1.067 MM; parent of alum (\$400K); alum, \$505K
Giving for Operational Support, 2021-2022: participation rates	Trustees, 92%; alumni, 7%; parents, 12%; faculty/staff, 21%
Giving for operational Support (does not include capital/ endowment gifts), 2021-2022:	\$3,712,000 (Annual Fund, Ramble, President’s dinner, restricted); more than 4,000 donors





## THE POSITION

The Vice President for Advancement will be expected to support Fr. Greg's strategic vision and aspiration for the School. The Vice President for Advancement will engage in further articulation of the aforementioned vision and the effective implementation of its initiatives and priorities.

The Vice President for Advancement position is ideal for that experienced fundraising professional who seeks to join a school that enjoys a terrific reputation and play a critical role in transforming the advancement office and making the school better and stronger. With a healthy admissions profile, enviable facilities, and dedicated and talented faculty and staff, the Vice President for Advancement will encounter a number of assets in his/her efforts to move an already great school forward.

The next Vice President for Advancement should be prepared to both lead and collaborate with a dedicated, bright and visionary head of school, an experienced senior administrative team, and a devoted faculty and staff. After taking the requisite time to know the School's people, programs, and traditions, the Vice President for Advancement will be expected to seize new opportunities and address the challenges that will move the School forward with conviction.

The goal for the Vice President for Advancement is to execute programs of giving that attract the maximum gift support possible to the institution while helping engage diverse audiences of stakeholders. The most obvious need is to pay particular attention to the Annual Fund. As the cornerstone of all other giving, participation rates among all constituencies needs to be elevated considerably. There are multiple areas of opportunity so that commitment increases (in absolute dollars and participation). Dependence on a small cadre of extraordinary donors needs to be broadened so the financial sustainability can be secured. There is considerable institutional memory and history among the trustees and senior administrators in place that is a huge asset for accomplishing these goals.



The successful candidate will be an outstanding professional who thinks strategically, communicates a clear and compelling case for support of the school's mission, follows up on details, and develops and thrives in a team environment. In addition to finding financial resources to strengthen financial sustainability, there are non-monetary goals as well: extending the impact of the school, creating goodwill in the community, strengthening the school's excellence and reputation and advancing relationships.

The Vice President for Advancement will also be tasked with plans for the extension of the school's endowment needs. This person must be fluent in major gift work to maximize the total philanthropic relationship of major gift donors and prospects (both Annual Giving and other) to the School. This means strategizing to generate higher levels of support and implementation of individual multi-year fundraising plans that focuses on renewals and increased gifts. It also means establishing long-term relationships with major gift donors and converting prospects into donors, while working collaboratively with colleagues and school leaders to meet the School's advancement objectives and mission. This major gift work also includes proposals and solicitations to foundations and corporations.



This major gift work focuses on the identification, cultivation, solicitation, and stewardship of leadership gift prospects and donors utilizing written solicitations, phone follow-up, outreach events, face-to-face meetings, dedicated events, and other methods (including gift planning vehicles) to maintain regular contact with these donors and prospects. The Vice President for Advancement can definitely impact the affinity a prospect and donor have for the institution (what activities will bring a prospect/donor closer; what factors will have an impact on increasing affinity) and can lead to increasing donor interest.

The Vice President for Advancement will directly oversee an office of ten professionals directly associated with advancement work (major and planned prospect research, gifts, alumni, annual fund, events, advancement services, stewardship) and an Office of Communications with 3.5 professionals.

Communication responsibilities entails oversight of public relations, web development, email marketing, news story content creation, and social media. There are also three part-time employees. The office members are looking for a leader who will advocate for their office and continue to raise their professional sights. There is substantial institutional memory within the office personnel with a number of alumni and current parents.

## CHALLENGES AND OPPORTUNITIES

While historically the school has enjoyed significant philanthropic support, there remains tremendous unrealized potential.

- Growing the Annual Fund which has essentially flat-lined over the past 10 years.
- Rigorously segmenting and targeting our annual fund.
- Increasing alumni participation in annual and total giving, especially in the ranks of young alumni and securing more recurring gifts.
- Developing a comprehensive, coordinated stewardship program.
- Hiring major gift officers and a prospect researcher.
- Establishing protocols to ensure that major and planned gifts are cultivated in a continuous, long-term basis.
- Developing modular, customized case presentations.
- Intensifying the planned giving program.
- Raising donor sights by increasing the number more “transformative” gifts (in excess of \$10 million).
- Assembling a comprehensive marketing/communications plan.





## DUTIES AND RESPONSIBILITIES

- Determines how to elicit novel approaches to all advancement activities eschewing conventional fundraising practices when appropriate, ensuring a growth mindset approach in office strategies so that Loyola Academy's advancement operation serves as a model of advancement for all independent schools.
- Serves as a champion and advocate for Loyola Academy, internally and externally, promoting advancement as a unifying force within the school; generate understanding and commitment to the advancement/stewardship process.
- Works to set an annual plan and strategy for each giving program, using innovative solutions and sophisticated data analyses to increase dollars raised, acquire and retain donors, and increase parent and alumni giving participation.
- Manages all aspects of the extended capital/endowment campaign, including campaign narrative and messaging; develop and write grant proposals to foundations and corporations.
- Leads and manages staff and volunteers, in coordination with the Admissions Department, to ensure timely and successful onboarding of new families.
- Personally manages a select portfolio of leadership-level annual fund and major gift prospects and executes comprehensive fundraising and stewardship plans for each donor/prospect.
- Arranges donor prospect calls for the Head of School and Trustees providing prospect research, background, information and the most effective strategies to maximize donor potential for giving.
- Works with the appropriate staff to secure project information and uses this information to develop materials directed at individual donors/prospects, such as highly personalized proposals that are in line with donor interests and programmatic priorities.
- Ensures portfolio activity and progress is recorded in the school's database.
- Develops special cultivation and stewardship opportunities, such as small events for select donor/prospects, and participate in larger donor cultivation and fundraising events.
- Assists in the identification and training of potential leadership volunteers and other partners to engage in major gifts outreach.
- Works with the Trustees, Loyola Academy Parent Volunteer Boards, and Alumni Class Agents in planning fund-raising efforts; sets goals, timelines and monitors progress.
- Works on developing and implementing a planned giving program.
- Works closely with appropriate staff members, attends and participates in the organization and implementation of functions such as new parent events, reunion activities for purposes of cultivation and stewardship.
- Conducts an annual assessment of programs and achievements based on regular meetings with members of the advancement staff so as to evaluate job performance, set objectives for improvement, maximize the team's effectiveness and efficacy, building on strengths and defining a path for correcting weakness.
- Participates in professional development, accountability skill and performance assessment tools to ensure maximum results.
- Maintains attendance, punctuality and performance standards as set forth in the Academy's employee handbook.
- Manages and maintains effective data resources in coordination with the Business Office and Admissions Office. Ensures the reliability and accuracy of systems for gift accounting and acknowledgment, pledge collection, Business Office reconciliation, prospect research and prospect management to support the department's initiatives.





- Collaborates with the Director of Communications, focusing on content and brand strategy to make sure these are integrated into donor segmentation and fundraising initiatives so as to advance the mission of the school.
- Stays current in the use of various social media sites (e.g., Facebook, YouTube, LinkedIn) to communicate with school constituents.
- Produces magazine, annual report, and other print materials (e.g. brochures, invitations, stationery)
- Manages website design, navigation, news management system, registration for courses and events, payments, donations, statistics.
- Provides structure for email marketing campaigns and social media daily posting
- Oversees official video production and photography, as well as digital asset system.
- Prepares reports and other materials to facilitate evaluation of progress toward meeting objectives, submits monthly reports to the Board of Trustees.
- Attends all scheduled Board of Trustee Committee meetings as necessary and provides regular progress reports (weekly and monthly).
- Manages the Advancement Office budget with particular attention to receivables and the metric of the ratio of Total Expenses to Total Cash Revenue.
- Capitalizes on the sense of momentum that invariably accompanies a new head of school. The School is poised at a positive inflection point in its history.
- Collaborates with other leaders on the school's senior administrative team.
- Encourages enthusiastic parent participation in the school community.
- Works closely with the Director of

Alumni Relations, helps to develop an alumni fundraising program that meets the school's current and future goals of engagement, involvement and financial support

- Supports the Alumni Council to carry out activities, events and initiatives to deepen engagement, commitment and support for Loyola Academy.
- Oversees the preparation and submission of proposals to the Academy's corporate and foundation donors, identify and secure sources of new founding from this sector.





### KEY QUALIFICATIONS AND QUALITIES

- Bachelor's degree required and relevant advanced degree preferred.
- A strong and capable leader who understands, embraces and persuasively articulates the Jesuit tradition and mission and the distinctive enactment of those at Loyola Academy.
- A person who understands the practice of the Catholic faith.
- A minimum of seven to ten years of experience and a proven track record of progressively challenging fundraising success, including annual operating support, major gifts, capital campaigns and planned giving.
- An ability to see the "big picture" and celebrate jobs well done by the entire team.
- An engaging and enthusiastic school professional, fully participating in school life and genuinely interested in faculty, students and parents, and who is also accessible to them.
- Strong and demonstrated success in leading, managing and dealing diplomatically and comfortably with a diverse community of parents, students, alumni, volunteers, partners and colleagues and have the presence, demeanor, and communication skills necessary to represent all of Loyola Academy's constituency effectively; excellent responsiveness to all constituencies.

- Outstanding analytical skills and proven success in using data-analytics and prospect wealth screening resources to develop programs and drive results.
- Demonstrated ability to build successful fundraising initiatives and appeals using current best-practices and innovative technologies to produce outstanding results.
- Vision, creativity, flexibility, and the capacity to develop a departmental strategic plan for raising philanthropic support to execute the school's strategic plan.
- Strong understanding of current digital communications, social media, fundraising software, and email-based solicitations.
- Active listener and skillful communicator with excellent oral, written, presentation skills.
- Experience collaborating with a Communication office in the writing of persuasive gift appeals.
- The personality, energy, intellectual integrity, warmth and leadership ability to inspire a school community; positive, passionate, can-do spirit; character, a strong ethical compass, a midwestern sensibility consistent with the mission and culture of Loyola Academy, as well as warmth, humility, and a sense of humor.
- A strong work ethic, with the passion and capacity to invest full days; yet also establish, uphold and model appropriate boundaries and standards for others in the community.
- Understanding of independent school communities and culture.
- The ability to meet deadlines within context of a complex office/school/community calendar.
- Leads from the front, confronts challenges head-on with appropriate transparency, building trust across all constituent groups within the school community.
- Active engagement in professional development and understanding of current best practices.



- Demonstrated ability to use good judgment and maintain confidentiality.
- Meticulous with excellent organizational skills.
- A working knowledge of donor database programs, preferably Raiser's Edge and Microsoft Office Suite.
- Ability to manage and prioritize multiple--and at times competing--responsibilities and adapt to frequent or unexpected changes.
- Effective manager of people and resources who hires well and delegates appropriately.

#### **Are You the Right Person for the Job?**

- Do you believe in the unlimited potential of young people to help shape our world with their service and are committed to that excellence?
- Do you have the vision and strategic thinking to lead, strengthen and maximize an institution that wants to "get things right", wise, professional in its operations, and committed to continual improvement?
- Do you have the experience in education, preferably in an independent school setting, to build upon Loyola Academy's educational programs, promoting pedagogical excellence and work towards overcoming any insularity of thought?
- Do you have the courage to take on an enormous responsibility for a nationally known institution?
- Do you have an outgoing personality and enjoy being with people? Are you an excellent listener?  
Do people enjoy spending time with you?
- Do you have a growth mindset? Are you comfortable with an experimental and entrepreneurial work environment? Do you think creatively and encourage innovation? Are you a curious person?
- What examples can you provide of how you have demonstrated forward-thinking abilities? How have you shown your mental nimbleness?
- Can you encourage and actively support change and innovation while retaining the core values and traditions of a school?
- Have you successfully solicited and closed modest, major and principal gifts?
- Can you handle the considerable range of tasks—from major gift solicitations to helping with the smallest details of an event? Are you a person of high energy?
- Do you have facility with equity and inclusion work required to embrace and support a diverse and dedicated community of faculty, staff, students, parents, and alumni?
- Are you a person of strength, gentleness, sincerity and authenticity?
- Are you reasonable and level-headed?
- What is your vision of independent school education, especially in the area of access and affordability?
- Do you know how to thoughtfully communicate your appreciation for people?
- Do you have the ability to inspire, lead, develop and attract talented staff?
- Do you know how to prioritize your responsibilities? Do you know how to use technology to maximize your time? Do you know how to delegate?
- Do you have the ability to lead, develop and manage well in all directions?
- Are you willing "to roll up your sleeves" for all the work that is needed?
- Do you get things done?
- Do you understand the cadence and rhythm of a school year? What are examples of how you collaborate with your colleagues in a collegial manner?
- What is your level of experience in communicating the narrative of an institution?
- Have you had experience in a capital/endowment campaign?
- Do you have business and financial savvy?
- Are you comfortable with the locational realities of Chicago as a major metropolitan center, knowing that Loyola Academy has a culture and personality all its own?





#### *Work Environment & Complexity*

Duties and tasks in this position are varied and complex. The position works on whole problems or projects. This position directs projects and the challenges are resolved with complex and precedent setting solutions. This position requires a high degree of collaboration. This position operates in a professional school environment. The functions of this position are performed in a typical office environment with no known hazards.

#### *Physical Demands*

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position, such as the ability to see, hear, speak and understand English and use a computer. This position is active and requires standing and walking, including stairs.

#### *Travel*

Occasional overnight travel will be expected in this position. A valid driver's license and passport required.

#### *Compensation*

At Loyola Academy, salaries are one component of a compensation package that includes retirement matching, health & dental insurance, and life, AD & LTD insurance. The school expects to pay a competitive compensation package with excellent benefits

depending on factors such as years of experience. There is no performance bonus. In addition to those factors, we believe in the importance of pay equity and consider internal equity with our current employees as part of any final offer.

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

Application submission screening and interviews will be completed on a rolling basis until filled.

Loyola Academy seeks candidates who will add to the diversity of the community. The school is an equal opportunity employer. The school complies with all legal requirements in connection with admissions and access to programs, facilities and employment practices regardless of race, color, religion, sex, gender identity, sexual orientation, national origin, genetics, age, or disability.

#### *Background Check*

Prior to submitting your resume for this position, please read it for accuracy. RG175 verifies academic credentials for its candidates and conducts a thorough review of candidates' social media presence. Loyola Academy will conduct thorough background checks prior to finalizing an offer.

Prospective Candidates should send a letter addressed to Fr. Gregory Ost diek, S.J. detailing his/her interest in the position and his/her suitability for it, an updated *curriculum vitae* or *resume*, and a copy of original writing on any subject of interest to the candidate—this can be written for this exercise or provided from something written previously.

These materials are to be sent in one, consolidated PDF to: James E. Pattison, [jpattison@rg175.com](mailto:jpattison@rg175.com)

