



Assistant Vice President of Complex, Legacy, and Principal Gifts
Pomona College
Claremont, California

THE SEARCH

The assistant vice president (AVP) of complex, legacy, and principal gifts, a key leader for Pomona College advancement, will build and set the strategic framework and direction for a newly established complex assets and principal gifts team and be responsible for generating new revenue for Pomona College. The position reports to the vice president for advancement, serves as a member of advancement's leadership team, and leads as a senior fundraiser for the college.

The AVP of complex, legacy, and principal gifts will grow and mobilize a team to provide philanthropic support for the college's top priorities and campaign initiatives through a donor-centric model of sustained fundraising. The AVP will oversee the administration of complex assets and principal gifts, including bequests and trusts, working with the general counsel and finance offices as well as outside financial institutions and advisors. The position requires management experience of frontline complex assets and principal gift officers and the ability to hire and retain excellent staff, facilitate a healthy team-environment, supervise and inspire employees toward excellence, and lead by example.

As a front-line fundraiser, the AVP of complex, legacy, and principal gifts will play a leadership role in shaping Pomona's engagement of donors and prospects with the capacity for seven- and eight-figure gifts in the form of outright, planned, and blended gifts and the transfer of complex assets. This individual will be expected to personally raise complex and principal gifts in support of the college's fundraising priorities and will carry a highest-level portfolio of donors with a capacity of over \$1 million across multiple regions, including internationally.

The AVP will also provide vision and leadership of a comprehensive and well-integrated complex assets and principal gifts fundraising program as part of Pomona's overall fundraising efforts as well as in support of the most aspirational, comprehensive campaign in the history of the college, resulting in a sustainable level of giving beyond the campaign. The position requires judgment and the ability to independently plan

and accomplish goals. The successful candidate will be an inspiring leader and an effective advocate for the value of the liberal arts with all constituents.

ESSENTIAL FUNCTIONS:

Reporting directly to the vice president for advancement, the AVP of complex, legacy, and principal gifts must work independently and collaboratively to perform the following essential duties and responsibilities:

1. Build, oversee, and execute the complex assets, principal giving, and planned giving program that focuses on alumni and parent prospects and donors.
2. Work closely with college's fundraisers to qualify, cultivate, solicit, and close blended gifts of complex assets.
3. Leading by example, the AVP will maintain a portfolio of complex assets and principal gift prospects and demonstrate frontline success by personally raising gifts in support of the college's fundraising priorities, focusing on donors with a capacity of \$1 million+.
4. Personally identify, qualify, cultivate, solicit, and steward a select portfolio of high-level donors and prospects with added focus on pipeline development to meet increasingly aggressive annual fundraising goals. Identification of prospects includes prospects for planned, complex assets, and principal gifts and prospective board members. Plan and execute seven or more substantive meetings with prospects each month. Achieve personal annual fundraising goals.
5. Supervise a complex assets and principal gifts team that has plans to grow to three or more frontline officers, to achieve the annual and campaign fundraising goals for the college. Develop a comprehensive, metrics-based, fundraising plan and set aspirational goals for direct reports.
6. Serve as the primary project manager for the complex assets and principal gifts program, working in close partnership with the president, dean, development colleagues, assistant secretary to the Board, and other senior leaders to identify prospects as well as implement and sustain successful strategies throughout the donor cultivation cycle.
7. Serve as strategic partner to the development of a legacy giving marketing plan and strategy that is led by Advancement Communications, including development of surveys of highly rated planned giving donors, and provide strategic partnership with Office of Stewardship to realize effective stewardship efforts of the Granite and Sagebrush Society to maximize the lifetime engagement and support of the College's mission.
8. Facilitate regular donor strategy meetings, and guide collaboration with colleagues across Pomona to explore ways to enhance fundraising efforts at the College including formulating creative cultivation plans, successful solicitation strategies including the receipt of complex assets, and develop and implement gift planning and legacy giving trainings with front line fundraisers to support identification of potential complex asset prospects and encourage blended gift opportunities. . Build and maintain strong personal and professional relationships with the entire Pomona College community, including alumni, faculty, staff, and volunteers.

9. Implement performance metrics to encourage the highest level of performance. In coordination with the AVP of Advancement Operations and Office of Research Relationship Management and Analytics, actively oversee officer portfolio activity and track outreach metrics.
10. Oversee the department operating budget, prepare budget requests, and monitor expenditures throughout the fiscal year.
11. Maintain a leadership style that is open and fluid and capable of inspiring, empowering, and motivating staff.

QUALIFICATIONS:

Education: Bachelor's degree or equivalent level of professional experience required; advanced study or law degree is strongly desirable.

Experience: The ideal candidate has a minimum of ten years of experience as a seasoned fundraising professional who has handled the receipt of complex assets. Management experience, in a medium to large development operation with a diverse portfolio of prospects, is preferred. Experience in an academic setting is strongly preferred, as is working in a campaign environment.

REQUIRED KNOWLEDGE AND CRITICAL SKILLS:

This individual must possess the knowledge, skills, and ability to successfully perform the essential functions of the job or must be able to demonstrate how the essential functions will be performed through knowledge, skills, and abilities not listed below.

1. Experience working in comprehensive and large-scale capital campaigns in a higher education setting.
2. A proven track record of success in personally qualifying, cultivating, soliciting, and stewarding seven-, eight-, and possibly nine-figure gifts from individuals, ranging from outright to planned and blended gifts.
3. A high level of comfort and effectiveness working with high-net-worth individuals, domestically and internationally.
4. Ability to set objectives and performance standards, provide constructive feedback, and achieve established program goals.
5. Ability to work effectively in a complex institutional setting and develop and sustain productive and effective relationships with donors, faculty, colleagues, and senior leaders.
6. A commitment to the highest standards of professionalism and ethics.
7. Ability to manage all activities and highly confidential information with patience, discretion, good judgment, courtesy, and tact while working with people from a wide variety of backgrounds.

8. Demonstrable exceptional organizational and time management skills necessary to complete work with accuracy and a keen attention to detail.

COMPENSATION AND LOCATION

The annual salary for this role is between \$205,000-\$220,000 with a competitive benefits package. The specific factors that Pomona College will consider when offering a salary to an individual will include, but not be limited to, education, training, relevant prior experience, and performance in prior roles.

Pomona College is located in the city of Claremont, CA, 35 miles east of Los Angeles. The city, with a population of more than 36,000, features sidewalk cafes, specialty shops, tree-lined streets, and bungalow homes. Claremont was recently ranked the 5th most-desirable town in the U.S., and housing prices are more affordable than many areas in Southern California. With stunning views of the San Gabriel Mountains, Claremont is less than an hour away from downtown Los Angeles and from mountains, desert, and beaches.

APPLICATIONS, INQUIRIES, AND NOMINATIONS

Screening of complete applications will begin immediately and continue until the completion of the search process. Inquiries, nominations, referrals, and CVs with cover letters should be sent via the Isaacson, Miller website:

<https://www.imsearch.com/open-searches/pomona-college/assistant-vice-president-complex-legacy-and-principal-gifts>

Rachel Ellenport, Partner
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Pomona College prides itself in being an open, competitive, and equal opportunity employer.