



**SEARCH FOR THE  
ASSISTANT VICE PRESIDENT, COMPLEX ASSETS AND PRINCIPAL GIFTS  
POMONA COLLEGE  
Claremont, CA**

The assistant vice president (AVP) of complex assets 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 assets 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 assets 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 assets 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 5<sup>th</sup> 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.

**TO APPLY:** Rachel Ellenport is leading this search with Grace Zakim and Megan Gorman. For more information, to submit a nomination, or to apply for this role, please visit:

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

*Pomona College prides itself in being an open, competitive, and equal opportunity employer.*

## ADDENDUM

### About Pomona College

Pomona College was incorporated in October 1887, by a group of Congregationalists who wanted to recreate “a college of the New England type” on the West Coast. Instruction began the next year in a small, rented house in the city of Pomona. By the 1920s, Pomona President James A. Blaisdell faced a difficult choice—to limit expansion to retain the college’s unique character or allow growth and expand into a university. Under Blaisdell’s guidance, the college chose a third path. Using Oxford and Cambridge as models, Pomona founded a consortium unlike any other in America.

Over the next 75 years, two graduate schools and four other undergraduate colleges joined Pomona as members of The Claremont Colleges, located on neighboring campuses, allowing cross-registration in the nearly 2,700 courses taught across the consortium, and sharing important facilities such as libraries. As such, Pomona offers both the advantages of a small liberal arts college and the resources of a university.

Today, Pomona enjoys a reputation as one of the most highly regarded and selective liberal arts colleges in the world. It also stands with a small number of institutions willing and able to admit students based entirely on academic achievement and promise without regard to ability to pay, and then to meet all demonstrated financial need of domestic students with no loans. Sixty-seven percent of students receive financial aid. Because of this institutional commitment, Pomona attracts some of the most highly qualified students in the country. Through an academically challenging curriculum, outstanding faculty, extraordinary students, and intimate size, Pomona provides an unparalleled environment for intellectual development and personal growth.

Pomona is a close-knit and diverse community of accomplished scholars, scientists, entrepreneurs, and artists who are passionate about making a difference in the world. Pomona provides excellence in undergraduate instruction across 48 majors in the arts, humanities, social sciences, and natural sciences. There are approximately 1,747 students from 61 nations and 49 U.S. states, as well as the District of Columbia, Guam, and Puerto Rico. Over 50 percent of Pomona students self-identify as members of BIPOC communities, and 13.3% of the class of 2025 are first-generation students. Almost all students live in one of 14 residence halls on the 140-acre campus.

With a student-faculty ratio of 8 to 1 and an average class size of 15, students work closely with their professors in the classroom, in the lab, and in the field. Pomona offers about 650 courses taught by 198 faculty members, all with terminal degrees. Its location—within an hour of Los Angeles and the mountains, desert, and beaches—provides countless opportunities for field study, research, and internships. About 53 percent of students participate in research with faculty, including more than 200 students who enroll in summer research programs.

Pomona has one of the biggest networks in liberal arts education with alumni working in a wide variety of career fields, from business, law, and medicine to non-profit, education, and science to politics, art, and entertainment. Pomona's 25,000 living alumni are dispersed across all 50 U.S. states and 74 countries.

### **Financial and Advancement Overview**

As of June 30, 2023, Pomona's endowment was valued at nearly \$3.0 billion. Historically, endowment distributions funded 57% of the college's operating expenses. Although the endowment is large relative to peers, growing the endowment is a necessity given Pomona College's entirely need-blind admission policy in conjunction with its commitment to meet all demonstrated financial need for all domestic students without any loans. Pomona College's total operating budget was over \$214 million for FY 2023 on a net tuition basis.

Pomona College's most recent comprehensive *Campaign Pomona: Daring Minds* concluded in 2015 with more than \$316 million raised from 28,124 donors. Funding priorities included capital improvements, unrestricted giving, financial aid, and faculty and programmatic support, both outright and endowed.

In FY 2023, total fundraising revenue was \$44.2 million, with approximately \$4.4 million given to the annual fund, \$326,000 to the parents fund, and \$13.2 million to the Pomona Plan, the first annuity and life income program in the country. For decades, the Pomona Plan has been a steady source of revenue for the college.

### **Maria Watson**

#### **Vice President for Advancement**

Maria Watson joined Pomona College in 2020 as Vice President for Advancement. As an Executive Officer of the College and reporting directly to the President, Watson oversees Pomona's development, principal and major gifts, gift planning, alumni and parent engagement, advancement services, and advancement communications and events teams. The team of nearly 80 staff raises over \$40 million per year and is currently leading the most ambitious campaign in Pomona's history to support the mission of one of the leading liberal arts colleges in the country.

Watson was previously Associate Vice President for Development at the University of Southern California (USC), where she set strategic direction for major gift, regional, and school/unit fundraising initiatives to realize the university's historic \$7.2 billion campaign, "Fas Regna Trojae." She was promoted to AVP of Development in 2014 after her successful tenure building philanthropic support for the university throughout the Northeast as the inaugural director of USC's New York Advancement office since 2011.

Watson brings 25 years of experience in the non-profit sector in fundraising, marketing, and public relations. Prior to the University of Southern California, she served as the Chief Development Officer for WFUV Public Radio, Fordham University in New York. During the course of her career, Watson has also held a number of senior positions in management, marketing, and fundraising in performing arts organizations, including Lincoln Center, New World Symphony, and Brooklyn Philharmonic. She spent seven years in marketing, ultimately as Director of Marketing and Communications for The Chamber

Music Society of Lincoln Center. Her career began with the National Endowment for the Arts and Congressional Arts Caucus in Washington, DC.

A native New Yorker, Watson earned a bachelor of musical arts degree from the University of Michigan in Ann Arbor on merit scholarship. She and her husband David live in Claremont. An avid motorcyclist, she is a proud Ducatista on the street and track and has taken up the futile pursuit of speeding on a racetrack.