Senior Associate Director,
Major Gifts & Gift Planning
Institutional Advancement

Summary

Reporting to the Associate Vice President for Development, with dotted line reporting to the Senior Director of Gift Planning, the Senior Associate Director, Major Gifts & Gift Planning will play a significant role in expanding a comprehensive major gifts and gift planning program at Occidental. The Senior Associate DoD will serve as an integral member of the Institutional Advancement team and will have direct responsibility for a portion of the College’s annual and long-term fundraising goals and Campaign For Good goals, Oxy’s first comprehensive campaign in 20 years. The overall campaign goal is $225M. They must demonstrate familiarity with a variety of the field’s concepts and demonstrate a command of best practices and procedures. Position requires mature judgment and ability to act independently to plan and accomplish goals.

The Senior Associate DoD will provide strategic vision and planning within the Individual Giving team, including support for fundraising, potential campaigns as well as initiatives and activities for private financial support of the college.

They will be responsible for managing a gift planning prospect portfolio and generating proposals. This Senior Associate DoD will also serve as a resource for their colleagues on gift planning vehicles and strategies that will, in turn, lead to the generation of gift planning proposals. They should possess a strong familiarity with gift planning best practices and a command of the development field’s concepts and adhere to accepted development procedures. Position requires mature judgment, and ability to act independently to plan and accomplish goals. Face-to-face visits with prospects and travel are required.

The Senior Associate DoD will also demonstrate the best of fundraising practices as a member of the Major Gifts and Gift Planning teams. They will be expected to maintain a robust face-to-face visit schedule and serve as a campus leader in portfolio management.
**Essential Functions**

**Portfolio Management / Major Gift and Gift Planning Discovery (90%)**

- Manages and builds an active portfolio of 95-120 highly rated suspects and prospects. This thoughtful portfolio management should include personal visits for active cultivation and solicitation as well as stewardship of existing donors.

- Develops a strategic fundraising plan consisting of identifying, qualifying, cultivating, soliciting, and stewarding individuals capable of making planned and/or campaign gifts.

- Solicits and closes planned and outright gifts of $50,000 - $1 million, individually and in collaboration with other development personnel.

- Actively works the existing Suspect Discovery Pool to uncover new prospects and to qualify them and then begin the cultivation process in a thoughtful and efficient manner.

- Conducts 12-15 high value contacts per month and 25 written proposals per year.

- Continues to develop regional plan for gift solicitation and strategy (for assigned regions(s) and assists with strategy for all regional markets.

- Works thoughtfully with the Individual Giving Team (Major Gifts and Gift Planning) suspects and prospects, their professional advisors and other development staff members to guide suspects, prospects, and their advisors in the evaluation and selection of planned gift vehicles appropriate to the donors’ personal circumstances and objectives. Prepares proposals and meet expected and stated proposal metrics accordingly.

- Completes successful discovery work and moves suspects and prospects along the donor continuum.

- Solicits a pipeline of future bequest gifts and secures gift agreements governing these future commitments.

- Develops and maintains positive, productive, and meaningful relationships with faculty, staff, alumni, volunteers and prospects for the purpose of increasing and augmenting the pipeline of major gifts.

- Works in coordination with the Oxy Fund for suspect/prospects leads and strategy discussions.

**Institutional Advancement Duties (5%)**
o Understands the mission and priorities of the Office of Institutional Advancement and serves as an advocate for the department.

o Adheres to the principles of ethics and standard practices as articulated in the Council for Advancement and Support of Advancement (CASE) Donor Bill of Rights from the Council for Advancement and Support of Education, Association of Professional Researchers for Advancement (APRA) Statement of Ethics and the Association of the Fundraising Professionals (AFP) Code of Ethical Principles and Standards as well as the standards of practice of his/her departmental profession, as appropriate.

o Participates fully during the planning, as deemed necessary, and execution of “tent-pole events” including and not limited to Homecoming and Family Weekend, Founders Day, and Reunion Weekend.

Other duties as Assigned (approx. 5%)

Required Qualifications / Knowledge / Core Skills

o Understanding of basic fundraising principles.

o Ability to comfortably speak with donors regarding philanthropic decisions.

o Strong organizational and strategic planning skills.

o Understanding of gift planning vehicles and strategies, as well as a command of fundraising principles.

o Ability to discuss and strategize with colleagues on gift planning vehicles and strategies.

o Strong organizational and strategic planning skills

o Experience working in a performance-based environment with tracking of meeting goals, contacts and dollars raised.

o Experience working independently and collaboratively in fast-paced, demanding, ever-changing and complex environment.

o Excellent interpersonal, oral and written skills and the corresponding analytical skills needed to established strategic fundraising goals and report on results.

o Ability to adapt to a variety of cultures and customs to engage donors and potential donors in philanthropic conversations.

o Ability to handle confidential information in a discrete and professional manner.

o Ability to travel at least 75% of the time.

Qualifications

Bachelor’s Degree required. Seven+ years of relevant experience required.

Able to manage projects and determine priorities, and to maintain a high degree of professionalism and confidentiality. Possesses strong interpersonal skills and ability to work with
broadly diverse groups of constituents including donors, alumni, trustees, friends of the College, faculty, attorney, trustees and other professional advisors, fundraising colleagues and institutional leadership. Demonstrate strong organizational management skills to successfully handle a wide variety of responsibilities. Demonstrates thoughtful leadership skills and adheres to a servant leadership mindset while also being focused on a highly productive, metrics-based system of performance. Previous work experience at Occidental College strongly preferred.

**Application Instructions**

Please submit a resume and cover letter explaining how your qualifications meet the requirements of the position to resumes@oxy.edu.

*As a condition of hire for a staff position and for appointment to a faculty position, Occidental College requires that all candidates who have received a conditional offer of employment complete an application form (if they have not already done so) and consent to a background check. Satisfactory completion of a background check, along with pre-employment verifications and references are required as a condition of employment, but only as permitted by federal, state, and local law, including the City of Los Angeles Fair Chance Initiative for Hiring Ordinance.*

*We will consider for employment all qualified Applicants, including those with Criminal Histories, in a manner consistent with the requirements of applicable state and local laws, including the City of Los Angeles’ Fair Chance Initiative for Hiring Ordinance.*