

Title: Vice President for Presidential Initiatives & Principal Gifts

Department: Principal Gifts

Reports to: Senior Vice President for Advancement

Position #: 1011901

FLSA: Exempt

Level: N/A

Date: April 2016

Position Purpose

Under the leadership of President Phil Hanlon '77, Dartmouth has undertaken the largest program of strategic investment in its history. This vision seeks to amplify Dartmouth's distinctive scale and configuration by integrating an unparalleled undergraduate liberal arts education with four excellent professional and graduate schools and fostering distinction through their unique spirit of collaboration in scholarship and teaching. The President, Provost and Deans of each school have forged an ambitious plan for the future that will feature prominently in the university's anticipated multi-billion dollar capital campaign. Dartmouth's 250th anniversary in 2019 will provide pacing and framing to these ambitions as leadership engages the alumni and parent community in the institutional transformation that anticipates that landmark celebration.

The Vice President for Presidential Initiatives and Principal Gifts (VP) will provide strategic leadership for fundraising efforts around institutional initiatives of the highest value and priority to Dartmouth. Reporting to the Senior Vice President for Advancement and serving as a member of Advancement's Senior Leadership Team, the VP will convene campus partners and advise in the development and execution of coordinated strategies aimed to maximize the life-time engagement and philanthropic support of Dartmouth's 250 most affluent families.

The Vice President will work in close partnership with the SVP and President in four key areas of responsibility in order to advance this program: advise staff and volunteers in the diverse philanthropic practices of the wealthiest donors, including multigenerational families, family offices, trust and estate strategies, and venture philanthropy, as well as the factors and strategies that will inspire unprecedented levels of support; collaborate closely with the Provost and Deans to develop, articulate, and outline investment plans for transformational initiatives that will lead Dartmouth to new levels of distinction; design and oversee an exemplary program of disciplined management for the College's top 250 relationships with focus and creativity; and personally administer a program to optimize support from Dartmouth's limited but well-resourced international community in Europe, Latin American, and Asia.

In addition to the Senior Leadership team (SVP for Advancement, Chief Operating Officer, the VP for Development, and the VP for Alumni Relations), the VP for Presidential Initiatives and

Principal Gifts will work closely with the Campaign volunteer committee to leverage peer-to-peer relationships in strategy. Three senior philanthropic advisors, as well as a high-performing team of support staff, report into this position.

Key Accountabilities

STRATEGIC LEADERSHIP

- Manages and optimizes Dartmouth's cultivation and stewardship programs in Principal Gifts, including the President's Leadership Council (an annual program of engagement and stewardship for Dartmouth's most generous families).
- Serves as trusted advisor to the Senior Vice President of Advancement, the President, the Provost, and Advancement Senior Leadership Team.
- Develops goals and oversees the implementation of an operating/strategic plan and budget for Principal Gifts area.
- Convenes campus partners and advises in the development of coordinated strategies aimed to maximize the lifetime engagement and support of Dartmouth's 250 most affluent supporters.
- Works closely with the Provost and Deans to develop transformational initiatives that will lead Dartmouth to new levels of distinction.
- Facilitates relationships with and supports the work of the Board of Trustees.

PROSPECT STRATEGY AND INSTITUTIONAL REPRESENTATIVE

- Manages own portfolio of high potential principal giving prospects through the identification, qualification, cultivation, solicitation, and stewardship cycles; forges relationships with a diverse population that will lead to high seven, eight and nine-figure solicitations; sets a personal example of frontline fundraising success for the Advancement team.
- Serves as resource and role model to staff on matters of prospect strategy, and offers new approaches and techniques; seeks to provide creative solutions to complex solicitations; relies on past experience in the field, and remains current with evolving trends in philanthropy.
- Earns reputation as good citizen and ambassador for Dartmouth through strong representation of the College to both internal and external diverse constituencies; serves as a trusted advisor, collaborative colleague, and effective mentor.

PROSPECT MANAGEMENT AND SOLICITATION

- Develops strong data-informed methods for the timely evaluation of program performance and forecasting;

PROSPECT MANAGEMENT AND SOLICITATION (CONTINUED)

- Travels to visit prospects, often in tandem with the President and other senior officers of the College; works proactively to bring prospects to campus for substantive visits and engagements.
- Oversees the preparation of funding proposals, talking points and scripts, assessments of potential support, briefings for senior officers and Trustees and stewardship reports for all assigned prospects; ensures that all interested parties are involved in key efforts focused on specific prospects; documents all substantive prospect contact through “contact reports” in Development’s Advance system.
- Recommends prospects for service on the College’s various board of overseers and advisory boards; interfaces with current and past Board members to support Board engagement, solicitation and ongoing recruitment efforts.
- Works closely with the Senior Vice President for Advancement to clear prospective donor assignments, maximize transparency and coordinate principal giving efforts.
- As a member of the senior management team; assists in efforts to enhance institutional image and visibility; communicates a strong and consistent message about the College to its constituencies; strengthens internal and external relationships and partnerships to benefit Dartmouth; and collaborates with the professional schools to support prospect strategies.
- Works in partnership with the Vice President of Alumni Relations to identify key prospect to participate in alumni events and serve in volunteer leadership roles.
- Promotes deferred giving and has an understanding and expertise in deferred vehicles and the role they can play in supporting visionary gifts.

STAFF MANAGEMENT

- Hires, coaches, supports, and evaluates Principal Gifts staff; leads and inspires staff to meet and exceed expectations.
- Tracks and drives prospect identification, assignment, qualification and solicitation activities to ensure success in achieving fundraising objectives.
- Works with the Senior Vice President to set fundraising goals for cash and commitments; designs strategies and operating programs to meet those goals.
- Establishes appropriate metrics to assess individual and team performance; such systems should inspire all staff and engender commitment to reaching personal goals and to raising maximum dollars for Dartmouth.
- Ensures a culture where effective teamwork, collaboration and innovation are expected, recognized, and rewarded; leads by example with regard to appropriate risk-taking, cross organizational cooperation, and clear standards of conduct.
- Understands how to favorably deploy campaign volunteers to foster their sense of impact while optimizing the experience and generosity of the donor.

STAFF MANAGEMENT (CONTINUED)

- In partnership with the Executive Director of Gift Planning, strives to realize the philanthropic potential of our constituency to keep Dartmouth competitive with other charities by making the case for support through planned giving vehicles.
- Fosters staff talent by coaching and mentoring staff and working with development colleagues to articulate and reinforce a non-territorial, sophisticated approach to donor-centric philanthropy that encourages flexibility and responsiveness, and increases the College's external support.

Performs other duties as assigned.

Position Requirements

SKILLS AND KNOWLEDGE

- Ability to raise donor sights, articulate aspirational goals and ideas, set priorities, present philanthropic opportunities, and close gifts
- Creative, professional, and entrepreneurial spirit; strong intellectual curiosity
- Professional credibility, intellectual depth, maturity, wisdom and collaborative skills to garner the trust and confidence of the President, senior staff, faculty, Trustees, students and other key constituents
- Excellent written and verbal communication skills with demonstrated presentation abilities
- Strong interpersonal skills; ability to work across a complex organization, and provide inspired leadership
- Ability to work independently and as part of a team
- Demonstrated analytical and strategic thinking capabilities; ability to embrace challenges and thrive in a fast-paced, team oriented environment
- Ability to handle sensitive and confidential matters with appropriate discretion
- Demonstrated integrity
- Demonstrated ability to work effectively with all constituencies; the ability to foster inclusiveness and diversity of ideas
- Ability to adapt to changing circumstances in a complex environment

EXPERIENCE

- 15 years of experience in the Advancement field
- Personal success cultivating, soliciting and stewarding individual donors at the major and principal gifts levels; the ability to inspire high net worth individuals to provide significant financial support to an institution
- Deep understanding of and appreciation for the philanthropic process and individual giving behaviors combined with direct solicitation experience
- Deep experience working with faculty, senior officers, and fellow development professionals

EXPERIENCE (CONTINUED)

- Working knowledge of planned giving, financial and/or estate planning concepts is highly desirable
- Excellent understanding of strategic campaign techniques and other campaign development tools
- Comprehensive campaign experience desired
- Proven ability to motivate staff to keep them engaged, energized and focused on results

EDUCATION

- Bachelor's degree
- Advanced degree preferred