



University of La Verne

Executive Search – Senior Director of Development, Planned Giving

ABOUT OUR CLIENT

Sterling Search, Inc. has been exclusively retained to recruit for the **Senior Director of Development, Planned Giving** for the **University of La Verne** in **La Verne, CA**.

Founded in 1891, the **University of La Verne** delivers undergraduate and graduate degree programs to approximately 8,500 traditional students and adult learners in La Verne, at regional campus locations, and online. The University degree programs represent more than 80 majors. La Verne's programs are highly recognized and sought after by major corporations, hospitals, government agencies, and school districts throughout California.

The University of La Verne is one of the most diverse universities in the nation. Approximately 44% of undergraduates are first-generation college-bound students, and more than 70% of the students receive some form of financial aid. Along with encouraging diversity, the university is dedicated to student success, as evidenced in its student/faculty ratio of 15:1. Further, the University of La Verne is a pioneer in adult education, offering specialized programs for adult learners at the main and regional campuses.

US News and World Report rates La Verne Online #1 in California for the third consecutive year, and 24th in the country. Additionally, the University of La Verne is Tier 1 in US News 2017 "America's Best Colleges," and has repeatedly been listed in Forbes' "America's Top Colleges."

Nestled in the foothills of the San Gabriel Valley, the city of La Verne is just 35 miles east of Los Angeles and freeway-accessible from LA and Orange counties. With only 33,000 residents, La Verne has a small-town charm and offers competitive pricing for housing and other living expenses.

Advancement Leadership

Sherri Mylott joined the University of La Verne in 2017 and serves as the Vice President of University Advancement. She has more than 25 year of experience in development, serving as vice president at both small and large universities and has participated in five successful comprehensive campaigns. Recently,

she served as Vice President for Development at Virginia Tech, where she led her 11-unit division in raising \$373 million.

Mylott brings to the University of La Verne her expertise in implementing successful fundraising strategies while creating entrepreneurial environments and a culture of collegiality. She is a highly successful principal gift fundraiser and has mentored and trained many development and alumni officers. **At the University of La Verne, Mylott is charged with leading the University's first comprehensive campaign.**

The Senior Director of Development, Planned Giving is an important member of the advancement team and will be integral to the success of completing the university's comprehensive campaign. S/he occupies a key fundraising role at the University as the principal driver of strategy and execution of planned gifts. While reporting directly to the Vice President for Advancement, s/he will work closely with the President and other senior administrators to facilitate the successful cultivation and solicitation of major and planned gifts. The Senior Director also serves as the public face of the program presenting seminars, engaging volunteers, attending events, conducting trainings, and partnering with on and off campus constituents, both locally and nationally.

Specific duties and responsibilities:

- Manage a portfolio of 125 high-level major gift and planned gift prospects with the capacity to make gifts of \$250,000 and above;
- Facilitate meaningful interaction between major/planned giving prospects and the President, Vice President for University Advancement, senior administrators, students, faculty, and volunteer leadership;
- Cultivate and solicit the university's highest level major/planned giving prospects;
- Conduct a minimum of 15 personal visits each month, resulting in \$4 million plus in annual contributions;
- Lead prospects through the fundraising cycle including discovery, cultivation, solicitation and stewardship;
- Take the lead in strategically creating a pipeline plan of planned giving prospects for future success with long-term cultivation strategies to engage prospects sooner in the cultivation cycle;
- Produce well-written, accurate, and timely gift calculations, proposals, cover letters, thank you letters, and briefings to support fundraising efforts;
- Track and record activities as they relate to assigned prospects;
- Lead the design and execution of a multi-year planned giving campaign strategy;
- Determine annual program goals;
- Direct the marketing coordinator in the formulation and execution of annual marketing and stewardship plans;
- Review copy for planned giving marketing and communication pieces;
- Hire, supervise, and manage the professional development and review process for the other members of the planned giving team;
- Create and conduct planned giving trainings for Advancement staff, with specific focus on front-line fundraisers;
- Advise other fundraisers on blended/planned gift strategies for prospects;
- Attend visits and collaborate with fundraisers, as necessary;

- Identify and enlist both local and regional professional partners in the Planned Giving Advisory Council.
- Write quarterly progress reports;
- Conduct weekly planned giving team meetings;
- Propose and administer annual and multi-year program budgets;
- Regularly report activity to the Vice President for University Advancement

Qualifications

- Bachelor's Degree required;
- Must have a minimum of 3 years demonstrated experience in securing cash and planned gifts of \$100,000 and higher or equivalent experience;
- Must have a minimum of 3-years demonstrated experience and success in working with prospects and donors through the life cycle of philanthropy in higher education and/or a nonprofit setting or equivalent;
- Must have a comprehensive knowledge and understanding of planned giving vehicles, familiarity with IRS code and regulations regarding planned gifts;
- Certification or comparable training in planned giving;
- At least three years of overseeing marketing and management of higher education planned giving programs preferred; and
- At least 2 years of supervisory experience preferred.

To be confidentially considered, send a resume or make a referral, please contact



Andrea Taylor or Sarah Agee at 714-433-7040,

or email us at

Andrea@sterlingsearchinc.com or Sarah@sterlingsearchinc.com

Direct all correspondence emails and telephone calls to Sterling Search, Inc. Any resumes sent or telephone calls made to University of La Verne of Innovation will be redirected to Sterling Search, Inc.

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