



## Senior Director of Major and Planned Gifts

*Philadelphia, Pennsylvania*

The Wharton School of the University of Pennsylvania seeks a proactive, collaborative, and value-driven Senior Director of Major and Planned Gifts (Senior Director) to provide strategic direction, inspirational leadership and oversight for the School's comprehensive major gifts fundraising program and alumni activities. This is an exciting opportunity for an accomplished fundraising professional to harness the energy of a high-capacity community of advancement colleagues, faculty, alumni and students in maximizing philanthropic support for one of the world's premier business schools and most highly-recognized providers of knowledge to the global business community.

Reporting to the Senior Executive Director of Development, the Senior Director will work closely with Wharton School Dean [Geoffrey Garrett](#), Vice Dean, other senior administrators and high-profile faculty to promote the educational, research, and financial priorities emerging from Wharton's current strategic planning cycle. The Senior Director will play a crucial role in developing fundraising outreach strategies and gift opportunities that will capture the attention of Wharton's key domestic donor networks in ways that align with institutional goals. S/he will lead a team of ten (including two directors of regional development, five major gifts officers, and three support staff) to secure leadership and transformational gifts. Collaborating with central university advancement liaisons in Planned Giving, the Senior Director will chart a renewed strategy for Wharton's planned and estate giving prospects. S/he will also be expected to personally cultivate and steward a select, highly-rated portfolio of individual donors and prospects.

Serving as a true citizen of The Wharton School community, the Senior Director will identify shared opportunities for dual asks, donor cultivation and engagement in concert with other Directors of Wharton development (The Wharton Fund, Corporate & Foundation Relations, International Giving, and Principal Giving) and External Affairs (Operations, Stewardship & Communication, and Alumni Affairs) to further realize value and potential across Wharton's diverse community of alumni and friends.

The ideal candidate is expected to have at least seven to ten years of experience with a proven record of cultivating, stewarding, and soliciting six-, seven-figure gifts and developing successful programs in major gift operations. Previous experience working in a complex organization, preferably higher education, is highly desired, as is the maturity and acumen to successfully navigate and collaborate within such environments. The successful candidate will have managed a staff and worked with volunteer-based support. Outstanding organizational and interpersonal skills are necessary, with a philosophy of teamwork, initiative, and curiosity. Excellent verbal and written communication skills are required and the ability to interact with all types of individuals is essential. The Director must have a strong, metrics-driven approach to his/her work; an ability to work independently and set targets and goals for the Major Giving team based on School priorities and as directed by development leadership. S/he should also have the



charisma, cultural sensitivity, and communication skills necessary to be an effective representative of the University of Pennsylvania and the Wharton School.

A bachelor's degree and demonstrated success in complex, dynamic organizations is required. An advanced degree is preferred.

## **The Wharton School**

In 1881, American entrepreneur and industrialist Joseph Wharton established the world's first collegiate school of business at the University of Pennsylvania. Wharton's pioneering vision was to produce graduates who would become "pillars of the state, whether in private or in public life." The Wharton School maintains a long tradition of educating visionary business leaders in academia, business, government, and not-for-profit organizations. Today, Wharton has expanded the scope of this vision to become the most comprehensive source of business knowledge in the world, with over 225 faculty members, 95,000 alumni, 5,000 students across 10 academic departments, 20 research centers, and more than 9,000 executive education participants annually. In 2017, The Wharton School was ranked the top graduate business school in the country by *US News & World Report* and third globally by the *Financial Times*.

Led by Dean Geoffrey Garrett, an internationally-renowned academic, and his vision of [doing well by doing good](#), The Wharton School in recent years has built upon its reputation and acumen in business and finance education and has invested in new, emerging areas critical to the global business and policy landscapes. Moving forward, priorities such as entrepreneurship, business analytics (and the decisions made therefrom), and alternative investments (the roles of private equity, hedge funds, venture capital, etc.) will be growth areas of support and scholarship.

More can be found here: [www.wharton.upenn.edu](http://www.wharton.upenn.edu)

## **Senior Director of Major and Planned Gifts**

Under the leadership of Vice Dean for External Affairs Sam Lundquist and Sr. Executive Director of Development Alison Matejczyk, a culture of shared responsibility and cross-departmental/team collaboration has spread – particularly in recent years – throughout the External Affairs Division at Wharton. Intentional investments have been made in donor and alumni relations, marketing communications, prospect analytics and annual giving to promote an integrated and value-based approach to fundraising and engagement. These aligned efforts combined with Dean Garret's bold vision and new strategic priorities are creating new pathways for capturing the attention of new potential donors and inspiring greater levels of commitment at the principal and transformational gift levels.

The next Senior Director of Major and Planned Gifts at The Wharton School will bring demonstrated fundraising success, inspiring and nurturing management experience, and the drive for continuous team and personal professional improvement. Most critically, however, they will bring a passion for the people, programs, and impact that Wharton School seeks to create in an increasingly interconnected and complex world.

### Fundraising

- Work closely with the Dean, Vice Dean for External Affairs, Sr. Executive Director of Development and peer Sr. Directors to develop strategies and partnered approaches that maximize a mixed ask and the effectiveness of the relationship between development programs and School priorities.
- Lead the expansion of Wharton's domestic network of support for major and planned gifts, working collaboratively with peers leading annual giving to identify new major giving prospects, as well as building the pipeline for principal gift prospects.
- Personally manage a prospect portfolio of some of Wharton's most significant donors with direct involvement in the identification, cultivation, and solicitation of major gifts (\$250k to \$5M) and stewardship of higher-capacity donors in collaboration with Principal Giving.
- Collaborate with central Penn Planned Giving liaison and major giving team to develop new strategies to make Wharton planned giving efforts proactive and forward-thinking; serve as a resource for planned giving conversations.
- Identify and reinforce new and existing opportunities for Wharton board engagement and volunteer leadership development.

### Management

- Oversee the recruitment, retention, development, and support of a high-performing major gifts team, including administrative support professionals.
- Craft ambitious yet realistic and collaborative fundraising goals on a team basis; institute individual and team metrics to ensure top-level performance and strategic improvement.
- Design program strategies for different prospect constituencies with two regional directors.
- Develop systems, processes, and policies with other (Executive) Directors to ensure accountable team interactions and collaborations across departments and units.
- Ensure staff remains up-to-date and conversant with evolving Wharton and donor priorities/interests.
- Model best practices and behavior for major giving staff, especially in relation to other External Affairs departments and colleagues.

### Cross-Unit and Staff Collaboration

- Serve as senior member of Development and External Affairs teams, working closely with the Senior Executive Director on strategic management and leadership issues.
- Build strong personal and professional relationships with colleagues, faculty, academic leadership, alumni, and friends throughout the university community, and serve as a resource, advocate, and spokesperson for development programs at Wharton.
- Encourage the continued partnership between the major gifts team, the Wharton Fund team, and increasingly fundraisers focused on Corporate and Foundation Relations.
- Appreciate the scale and scope of Wharton's robust, compelling prospect pool, encourage partnership with Development Operations and Donor Relations to ensure team accountability and adherence to best practices and policies in support of overall development strategies.

## Attributes of the Ideal Candidate

- 7-10 years of professional development experience, with demonstrated fundraising success at the major gift level (six- and seven-figure level), with a minimum of 2-4 years in a management role.
- Bachelor's degree required; advanced degree preferred.
- Understanding of and appreciation for all constituent elements of a high-functioning development department such as Wharton, especially the critical role major giving plays to drive annual giving success and stewardship of principal giving, and experience with planned giving programs and options.
- Ability to respectfully and adeptly communicate, interact, and facilitate conversations with high-level prospects and donors, especially those working in the private sector.
- Possess the ability to think strategically and creatively, critical thinking and analysis skills, and the ability to transform new ideas into executable and successful programs.
- Possess a supportive and accessible management style, the ability to lead and motivate a diverse staff and to encourage change and growth in both people and programs, and a strong commitment to personal and professional development.
- The ability and willingness to travel often on behalf of the Wharton School and the University of Pennsylvania.
- A strong interest in and commitment to the work of The Wharton School.
- Excellent verbal and interpersonal communications and writing skills critical for communicating with a broad and diverse audience, including internal leadership and external high-level donors.
- A healthy sense of humor an energetic approach to the work of the Senior Director.
- Strong desire to effect change for a global community that reaches beyond Wharton's three physical campuses.

## How to Apply

The Wharton School has retained Talent Citizen to assist in this recruitment. President Tracy D. Welsh, Associate Vice President Adele Mezher and Associate Connor Daley are leading this search.

Please submit your resume and a cover letter outlining your interest, the reasons why you are best suited for the position and would be a great addition to the External Affairs team, and where you learned of the position. Applications should be sent to: [wharton-sd@talentcitizen.com](mailto:wharton-sd@talentcitizen.com)