



## MOUNT HOLYOKE

### Director of Gift Planning *South Hadley, MA*

Mount Holyoke College (MHC), a private liberal arts women's college that is gender diverse and the oldest member of the historic Seven Sisters colleges, seeks a consultative and proactive Director of Gift Planning (Director) to lead a highly productive gift planning team. Reporting to the Associate Vice President for Development, the Director will have a unique opportunity to call upon the support of a fiercely loyal and connected alum community while bringing the ability to leverage insights and understanding of how complex assets might be unlocked to increase the reach and complexity of the College's gift planning program and explore its many synergies across development as the College prepares for a comprehensive campaign.

With the inauguration of President Danielle Holley, several new campus-level leaders, and a robust strategic planning process nearing completion, the Mount Holyoke community is alive with ambition and excitement for co-creating the future of the College.

This is an exciting opportunity for an accomplished leader to contribute to MHC's advancement program by implementing innovative and action-oriented techniques, augmenting marketing and communications efforts, and applying data-driven strategies. The Director will educate and engage members of the MHC community in gift planning efforts in ways that reflect the collaborative and collegial culture of the College. The Director will play an essential role in setting gift planning strategy, designing compelling cases for support, and facilitating regular lines of communication across campus to advance gift planning efforts. Success for the next Director will be defined in part by creative, robust, and forward-thinking engagement strategies for securing complex gifts from a broad donor base of new and existing supporters. The Director leads a team of two professionals. Grounded in exceptional relationship-building skills, the Director will manage a portfolio of donors and prospects while maintaining visibility and leadership for gift planning opportunities and the gift planning team, as well as serving as a resource for colleagues across the College.

In partnership with the Associate Vice President for Development, the Director will be a key driver in the College's efforts to maintain the prominent role of planned gifts in achieving annual fundraising goals. The Director will be critical in achieving these goals by expanding the reach of the gift planning program through intentional, collegial collaboration with development officers. Leading by example, the Director will inspire a positive culture of mutual ambition, shared credit, and collective celebration of achievements.

The ideal candidate must possess a minimum of ten years of fundraising experience with proven success securing a full spectrum of deferred gift techniques and vehicles, including gift annuities, charitable remainder trusts, pooled income funds, life estate agreements, and charitable estate plans. Leading candidates will have broad experience in major and planned gifts from which to draw when guiding complex gift conversations and strategies. The candidate must possess a high level of integrity and credibility; be a self-starter with a clear set of priorities; and be adaptable to changing circumstances. The successful candidate must have extraordinary communication skills with a collegial, team-building style and a demonstrated ability to motivate staff as well as to cultivate productive, collaborative relationships with faculty and staff across campus. The candidate will foster a professional work environment that rewards individual and collective success, builds confidence, and promotes diversity in all its forms. In accordance with its core values and mission, Mount Holyoke is especially interested in recruiting members of diverse communities and individuals with a commitment to anti-racism. An undergraduate degree is required.

**Commented [RP1]:** The MHC posting said 7 years, but that feels light to us. Is this adjustment ok?



## Mount Holyoke College

Mount Holyoke College is a selective, nondenominational, residential liberal arts college that welcomes applications from female, trans, and non-binary students. Mount Holyoke’s exploratory education opens new pathways for discovery and knowledge, while the collaborative community supports students as they develop skills to solve challenges everywhere. Students are encouraged to see the world through a different lens—exploring beyond traditional boundaries and connecting to global perspectives and points-of-view. Working closely with exceptional faculty and staff, students are challenged to think creatively, act collaboratively, and lead purposefully. That’s why Mount Holyoke alums can be found on the leading edge of change—from the arts and humanities to STEM innovation to social justice and beyond. As a community of achievement, Mount Holyoke celebrates what makes each of us extraordinary while cultivating a deep sense of connectivity.

Mount Holyoke’s vibrant campus is home to over 2,100 students, almost a quarter of whom are from around the world. Expanding beyond gender diversity, 25% of students identify as domestic students of color—African American, Asian American, Latinx, Native American or Alaska Native, Native Hawaiian or Pacific Islander, or multiracial.

With strong traditions and spaces designed for collaboration, the College offers three distinct Academic Centers meant to empower students to become agents of change—globally competent, environmentally responsible, ready to lead. [The McCulloch Center for Global Initiatives](#) is the hub and catalyst for comprehensive internationalization at Mount Holyoke, offering varied and meaningful opportunities for students to advance their global competencies and for faculty to incorporate more global perspectives into their teaching. The exceptional international diversity of the community offers a powerful context for building global competence. [The Miller Worley Center for the Environment](#) is dedicated to actively engaging Mount Holyoke students in the scientific, social/human, and global dimensions of environmental study, enabling students to make connections—across disciplines, across points of view, across constructs—that help them understand the concept of “environment” more broadly in their work, community, and lives. [The Weissman Center for Leadership](#) promotes the exploration and expansion of leadership—in all its many shapes and forms, helping students, faculty, and staff learn the skills to think strategically and yield influence—such as by identifying an audience, honing a message, advocating and organizing for change, and taking leadership in one’s daily life.

There is a treasure trove of [traditions](#) that are time-honored at Mount Holyoke that are emblematic of the ways in which students, alums, faculty, and leaders show up every day, treating each other with respect and affecting positive social change. These experiences and ways of being serve as unifying threads binding past and present students, faculty, and staff.

## Mount Holyoke’s Strategic Plan

The College’s [latest strategic plan](#) came to a successful close in 2023 and work is well underway on the next roadmap with an anticipated May 2024 approval date. Of particular note for employees, the 2023 plan established the [Diversity, Equity and Inclusion Division](#), invested in employee development and training, and navigated a complex employee relations and staffing environment as the result of the pandemic. As part of the College’s strategic plan, the community committed to ensuring balanced annual operating budgets for the College each fiscal year. The College accomplished that goal in 2017 and has maintained it ever since, even during the pandemic. The Board of Trustees has adopted a \$163M operating budget for FY24. The



College enjoys a healthy financial position but one that requires careful stewardship and planning to maintain. MHC has a robust endowment, currently estimated at just over \$1 billion with a distribution of approximately \$48 million to support the operating budget during FY24.

**Danielle R. Holley**  
President, Mount Holyoke College

On July 1, 2023, Danielle R. Holley took office as the twentieth president of Mount Holyoke College. A noted legal scholar and educator, Holley served as Dean of the School of Law at Howard University from 2014 to 2023 prior to joining MHC. She holds a B.A. from Yale University and a J.D. from Harvard Law School and previously served as a law clerk to Judge Carl E. Stewart on the U.S. Courts of Appeals for the Fifth Circuit.

Her achievements during her tenure at the Howard School of Law include the introduction of a six-year BA/JD program; the launch of experiential learning and career preparation initiatives with World Bank, Microsoft, and Amazon Studios, among others; and a 200 percent increase in fundraising success, including a \$10 million grant to support public interest law, the largest in the Howard School of Law's history.

President Holley's scholarship spans the governance of public schools, increasing access to higher education, and diversity in the legal profession. Her contributions to the legal profession and higher education have been recognized with numerous awards including the inaugural Impact Award from the Association of American Law Schools, the American Bar Foundation's Montgomery Summer Research Diversity Fellowship Distinguished Alumni Award, the Lutie Lytle Conference Outstanding Scholar Award, the National Bar Association's Heman Sweatt Award, and the University of South Carolina Educational Foundation's Outstanding Service Award. She was twice awarded the Outstanding Faculty Member award during her tenure at the University of South Carolina School of Law.

Currently, President Holley serves as the co-chair of the Board of the Lawyers' Committee for Civil Rights. She has also served on the board of the Law School Admission Council and on the board of the Howard University Middle School of Math and Science. She is a moderator for the Aspen Institute, a Liberty Fellow through the Aspen Global Leadership Network, and a fellow with the American Council on Education. She is also a member of Delta Sigma Theta Sorority, Incorporated, the trailblazing sorority for Black women in higher education founded at Howard University in 1913.

President Holley is Mount Holyoke's first permanent Black president in the College's 186-year history, and the fourth Black woman in history to lead one of the original Seven Sisters.

**Heather McDonald**  
Associate Vice President for Development

In partnership with Vice President for College Relations Cassandra Jolley, Heather leads a donor-centric development program and oversees the frontline fundraising team, which includes the Mount Holyoke Fund, leadership and principal giving, and gift planning.

Before joining Mount Holyoke in September 2023, Heather served as Assistant Vice President and Campaign Director at University of Connecticut (UConn) Foundation, where she was a key member of the advancement leadership team charged with developing and leading the university's comprehensive \$1 billion campaign.



During her tenure at UConn, the Foundation completed four back-to-back record-breaking fundraising years and achieved a 200-percent increase in fundraising over a ten-year period.

Mount Holyoke's mission attracted Heather due to her lifelong commitment to advancing women's rights and those of gender-diverse people. She earned a Bachelor of Arts in Women's Studies, Human Resources, & Social Change from State University of New York at New Paltz, as well as a Master of Education from University of Hartford, a graduate certificate in Nonprofit Leadership and Management and a Doctorate in Educational Leadership from University of Connecticut. Heather's dissertation examined equity and inclusion as related to women's leadership self-efficacy in higher education advancement. In 2023, Heather earned an Inclusive Philanthropy (DEI) micro-credential from Florida International University.

As a volunteer and civic leader, Heather is a member of the Connecticut Governor's Council on Women and Girls, the Connecticut Women's Council, and previously served on the UConn Women's Center Advisory Board as chair of the fundraising committee, among many other activities in service to the field of professional fundraisers.

### Development at Mount Holyoke

With an endowment valued at just over \$1 billion, MHC has a legacy of endowment giving to ensure that "Mount Holyoke forever shall be." In FY22, MHC raised more than \$50M, including \$19.4M in bequest gifts and pledges and driven by support for the [Meet the Moment Challenge](#) and the third annual March4MHC two-day fundraising event. On average, the College is currently raising between \$30 million and \$40 million in annual philanthropic support, including \$16.6 million in planned gifts during FY23. There are more than 39,000 living alums with a dedicated track record of volunteer support. MHC distinguishes itself by consistently achieving industry-leading participation rates among alums, and this loyalty, pride, and commitment to the College provide ripe opportunity for pipeline growth in gift planning. Planned gifts have steadily accounted for approximately \$12-20 million of the College's annual funds raised. Alums and friends of the College who make charitable contributions are recognized through [giving societies](#), such as the Mary Lyon Society for donors who have pledged bequest and estate gifts.

The 30-member Board of Trustees leads by example with a 100-percent participation rate in giving annually. Fundraising priorities include faculty support, student financial aid, and continued revitalization of infrastructure, with a goal of becoming a carbon-neutral campus by 2037.

The College Relations division comprises a team of approximately 58 professionals in leadership/major giving, gift planning, grants, annual fund, marketing and communications, and operations, including stewardship, data services, and prospect research.

The College Relations team works in close concert with the Mount Holyoke Alumnae Association, an independent organization that was created at a time when women were not permitted to be trustees of colleges in order to give alums an independent voice and a financial role in the College's future.

### Director of Gift Planning

The Director of Gift Planning will report to and work closely with the Associate Vice President for Development. The Director leads the two-person Gift Planning staff as they work to identify, cultivate, and



solicit potential planned giving donors. The Director of Gift Planning also oversees a broad marketing program for gift planning and maintains an appropriate prospect pool of assigned individuals, which may include major gift or high-level annual fund prospects in addition to gift planning prospects. A critical role of the Director is to develop and nurture relationships resulting in increased partnerships with gift officers and teams across the College to promote planned giving, explore the value of complex or blended asks, and build a pipeline for future gifts. The Director will conduct joint visits with development officers and others, leveraging resources and technical expertise to meet team goals. Therefore, marketing acumen and an authentic ability to build relationships with a diverse variety of people will be critical to the Director's success.

In addition to leading the Gift Planning team, the Director of Gift Planning provides ongoing stewardship to donors, defines and meets financial goals, oversees Gift Planning marketing and communications initiatives, and works closely with other College staff to ensure effective and efficient gift administration and stewardship.

#### Essential Duties

- Directly supervise the Assistant Director of Gift Planning and Gift Planning Coordinator, including training, evaluating performance, and mentoring for growth.
- Manage the cultivation and solicitation of gift planning prospects, as appropriate, in collaboration with The Mount Holyoke Fund and Leadership and Principal Giving staff: develop donor strategies involving planned giving; provide technical support, advice, assistance, and education seminars for staff and administration regarding planned giving, estate planning, IRS regulations, and other technical matters; prepare and present proposals; travel regularly to visit prospects for cultivation, solicitation, and stewardship purposes.
- With the aim of both engaging high potential current prospects and building pipeline across life-stages, work closely with AVP, Director of Leadership Giving, and the Marketing and Communication team to develop and oversee the implementation of a comprehensive program to market planned gifts to Mount Holyoke constituents including: direct mail, email, College publications, Planned Giving web pages, and College Relations website. Offer on- and off-campus seminars on planned giving for volunteers as appropriate.
- Manage and grow the Mary Lyon Society, Mount Holyoke's stewardship program for planned giving donors, in collaboration with the donor relations, annual giving, leadership, and principal gifts staff members; work with the Mary Lyon Society volunteer leaders to increase the number of planned gifts and assist with stewardship, cultivation, and solicitation; oversee stewardship mailings to all members and mailings from volunteers to classes; plan and manage annual stewardship event(s).
- Work closely with the College's Finance Office to oversee asset management, performance, and administration of the gift planning program; Kaspick & Company manages investment and administration of pooled income funds and trusts; PG Calc handles gift annuity administration.



- Manage contract preparation for gift annuities and pooled income funds, as well as trust preparation for charitable remainder trusts, working with College counsel as appropriate and necessary.
- Work closely with the College Comptroller on tracking and monitoring all pending estates through the settlement process.
- Work closely with the College's Gift Acceptance Committee to assure correct and prompt recording and compliance with gift acceptance policies and procedures.
- Develop and oversee other gift planning initiatives as opportunities arise.

### Experience and Qualifications

The ideal candidate will bring many of the following professional qualities and experiences:

- A commitment to embracing the mission of Mount Holyoke College and its current admission policies is nonnegotiable.
- A minimum of **ten years** of experience in gift planning, or a combination of gift planning, major gifts, law, finance, or trust services.
- Expertise with gift planning vehicles and activities, including broad knowledge of tax laws that impact charitable giving, personal assets, and estates.
- Preference for individuals with at least three to five years of management experience.
- Comfort working with a diverse population (including more senior donors) and handling confidential materials with discretion.
- Excellent organizational, interpersonal, and written and verbal communication skills.
- Demonstrated ability to cultivate and advance relationships strategically and proactively, resulting in six- and seven-figure gifts.
- A bachelor's degree is required. Advanced degrees or certifications are preferred.
- Significant travel and occasional evening and weekend work will be required.

### Location, Schedule, and Compensation

Mount Holyoke College offers a competitive salary budgeted in the range of \$119,000 - \$140,000 annually for this position. The exact compensation offered will be determined by experience. Information about the benefits package is available [online](#).



This is a South Hadley-based position. Mount Holyoke is offering a hybrid working schedule for most employees, which allows employees to work in the office or remotely. Candidates should expect to work on campus on a regular basis.

Mount Holyoke College is situated on a 700-acre campus in South Hadley, Massachusetts, located in one of New England's most beautiful and intellectually vibrant regions: the Connecticut River Valley, where the life of the mind finds fertile soil. Mount Holyoke is a member of the [Five Colleges Consortium](#) along with Amherst, Hampshire, and Smith Colleges and the University of Massachusetts Amherst.

South Hadley is a charming community with rich history, ample recreational opportunities, and convenient shopping, art, and cuisine. It is just 15 minutes away from Amherst and Northampton, 45 minutes from Hartford, Connecticut and Bradley International Airport, and 90 minutes from Boston.

#### **Interested in Learning More?**

Mount Holyoke College has partnered with Talent Citizen to assist in this recruitment. Please reach out to President Tracy D. Welsh, Managing Associate Rachel K. Partin, and Associate José Cisneros to share your resume and cover letter via email at: [mhc-dgp@talentcitizen.com](mailto:mhc-dgp@talentcitizen.com).

*Mount Holyoke College is a women's college that is gender diverse. The College is committed to providing equal access and opportunity in employment and education to all employees and students. In compliance with state and federal law, Mount Holyoke College does not discriminate on the basis of race, ethnicity, color, genetic information, sex, national or ethnic origin, religion, age, physical or mental disability, marital status, sexual orientation, pregnancy, gender identity or expression, ancestry, veteran or military status, or any other legally protected status under federal, state, or local law.*