

# ASPEN • LEADERSHIP • GROUP

## MAJOR GIFTS OFFICER—CALIFORNIA UNITED STATES NAVAL ACADEMY FOUNDATION

Location: California

<http://usna.com>



## UNITED STATES NAVAL ACADEMY *Alumni Association and Foundation*

The Aspen Leadership Group is proud to partner with the United States Naval Academy Foundation in the search for a Major Gifts Officer—California.

The Major Gifts Officer—California will add specialized strength and capabilities to a strong team committed to building upon the unique qualities and heritage of the U.S. Naval Academy. This position is responsible for soliciting major gifts in support of the United States Naval Academy's strategic priorities, the Brigade of Midshipmen, and the U.S. Naval Academy Foundation and Alumni Association. With a strong prospect pool, the major gifts program at the U.S. Naval Academy Foundation is focused on securing new major gift commitments of \$100,000 or more.

The Foundation is currently in the quiet phase of a \$400 million comprehensive campaign that is scheduled to conclude in 2020. This position will support the current strategic priorities as well as additional priorities that extend beyond the duration of the current campaign. Examples of strategic campaign priorities include the Naval Academy Annual Fund (unrestricted support), Athletic Excellence, Center for Cyber Security Studies, Stockdale Center for Ethical Leadership, Experiential Leadership Development, and Faculty Development and Recruitment.

The United States Naval Academy Foundation supports, promotes, and advances the mission of the Naval Academy by working in conjunction with Academy leadership to identify strategic institutional priorities, and by raising, managing, and disbursing private gift funds that provide a margin of excellence in support of the nation's premier leadership institution.

The U.S. Naval Academy Foundation helps to advance the Naval Academy and the Naval Academy Alumni Association by providing private resources to achieve and maintain a broad range of mission-enhancing activities that support the nation's premier leadership institution and its graduates.

The Foundation's responsibilities in support of the Naval Academy include developing, promoting, and enhancing the programs and facilities of the Naval Academy and its Alumni; soliciting and providing private gifts and grants in support of the Academy's highest priorities within its Centers of Excellence—Leadership & Character, Academic, Athletic, and Admissions; receiving, managing, distributing and investing private contributions exclusively for the benefit of the Brigade of Midshipmen, the Naval Academy and its alumni; and advancing the admission of highly qualified candidates to the Naval Academy by providing scholarship opportunities to enable aspiring young men and women to attend private preparatory schools.

The Foundation's mission is to support the achievement of a "margin of excellence" that allows the Naval Academy to compete with the most prestigious universities in the country for students, faculty, and resources. Naval Academy graduates have long served the nation as government, business, military, and community leaders.

## **REPORTING RELATIONSHIPS**

The Major Gifts Officer—California will report to the Vice President, Development.

## **PRINCIPAL OPPORTUNITIES**

This new Major Gifts Officer joins the Naval Academy Foundation at a particularly exciting time. The Foundation is deeply immersed in the quiet phase of a \$400 million comprehensive campaign, the largest in its history, one designed to have a transformative impact on one of the nation's premier leadership development institutions and on the young men and women who will become the next generation of Navy and Marine Corps officers. The Major Gifts Officer will play an integral role in securing the resources necessary to pursue the Naval Academy's strategic objectives, most notably essential priorities in the areas of cyber security, international programs, and ethical leadership. He or she also has the opportunity to contribute to the development of an enduring culture of philanthropy in support of the Academy, particularly on the West Coast, home to one of the largest concentrations of Naval Academy graduates and Navy personnel in the world.

The Major Gifts Officer also has the opportunity to become part of a growing, integrated, collaborative team of advancement professionals who share a deep commitment to the future of the Academy, the naval service, and the nation. In addition, the Major Gifts Officer will help lead the efforts of a dynamic regional volunteer committee of alumni and other friends of the Academy representing a wide range of industries and interests who have pledged both their personal generosity and their time and talents to the success of the campaign.

## **PRIMARY RESPONSIBILITIES**

The Major Gifts Officer—California will

- manage a regional territory and meet key performance indicators by completing 10-12 meetings per month (100-120 annually); conducting 15 major gift solicitations per year; securing gift commitments of \$500K in the first year and \$1.5M per year within three years; and identifying 10-15 new major gift prospects annually;
- develop and manage a portfolio of 150 prospective and active major gift donors capable of making six and seven figure gifts including approximately 50% of prospective major gift donors in active cultivation/stewardship and 50% of prospective major gift donors in discovery;
- engage in strategic outreach (phone calls, letters, personal visits, visits from volunteers) with major gift prospects to develop their interests in the Academy;
- identify appropriate giving opportunities matching major gift prospect's interests and giving capability;
- prepare solicitations and gift agreements that make a compelling case for donors to meet Naval Academy and/or Alumni Association needs;
- ensure that prospect data discovered in the cultivation process is accurately entered and maintained in the Foundation/Alumni Association's database;
- develop strategies for gift cultivation and solicitation of those prospects determined to be qualified major gift prospects;
- develop and implement regional campaign activity in key markets;
- work closely with key internal stakeholders to develop major gift strategies; staff Academy and Foundation leadership as appropriate;
- participate in a significant number of weekend events;

- appropriately steward donors who have made major gifts, acknowledge their contributions, and encourage future support;
- assist with the development and implementation of events focused on cultivating and stewarding major gift prospects and donors; and
- perform other duties as assigned.

## KEY COLLEAGUES



**John Rudder '78**  
**Vice President, Development**

John Rudder is a 1978 graduate of the United States Naval Academy and served 5 years in the Navy's nuclear submarine program. He spent the next 30 years in corporate America in a variety of sales and executive roles. His last 15 years were with two early stage companies where he ran the sales organizations.

In Dec 2011, Rudder joined the United States Naval Academy Foundation as Director of Corporate and Foundation Relations. In 2014 he picked up the additional responsibilities of managing the Major Gifts and Planned Giving teams. For the past two years, he has also served as the Major Gifts Officer for northern California.

Previously, Rudder has been President of his Naval Academy class and served as a volunteer for 5 years supporting corporate fundraising before joining the Foundation. John is married and lives in Annapolis and has two adult daughters.



**Mr. Byron Marchant '78**  
**President and CEO, Naval Academy Alumni Association and Foundation**

Byron Marchant is the President and CEO of the U.S. Naval Academy Alumni Association & Foundation. Prior to this position, Marchant served as the Executive Vice President, General Counsel and Chief Administrative Officer for Black Entertainment Television in Washington, DC. He was a partner with the law firm Patton Boggs, LLP, and previously served as Senior Vice President and General Counsel for Annapolis-based Telecommunications Systems Inc. He also served as Senior Legal Advisor to Federal Communications Commissioner Andrew Barrett

and was an attorney with Sidley Austin.

Marchant graduated with merit from the U.S. Naval Academy in 1978 earning a Bachelor of Science in American political systems and earned his J.D. from the University of Virginia Law School. He was in the submarine service before transferring to the Naval Reserve in 1984, where he fulfilled numerous assignments in the Naval Reserve Intelligence program and attained the rank of Commander in the U.S. Naval Reserves.

Marchant is a life member of the U.S. Naval Academy Alumni Association, a member of the New Jersey Bar, the U.S. Supreme Court Bar, the Federal Communications Bar Association and the American Bar Association. He serves on the Board of Directors of the Chesapeake Bay Foundation, the National Sailing Hall of Fame and the U.S. Naval Academy Foundation. He is a member of the Board of Trustees for the U.S. Naval Academy Alumni Association. Marchant served two terms on the Board of Visitors at George Mason University, and also has served on the Advisory Committee to the Sallie Mae Foundation, The American Red Cross of the Washington Metropolitan area, the University of Virginia Alumni Association Board of Managers and the

UVA Campaign Executive Committee. Marchant was an adjunct professor at the University of Virginia Law School.



**William J. O'Connor, Ph.D.**

**Executive Vice President**

Dr. William J. O'Connor joined the United States Naval Academy Foundation as Executive Vice President in April 2012. Most recently, O'Connor served for nine years as Vice President for Institutional Advancement at St. John Fisher College in Rochester, New York. Prior to his time at St. John Fisher, O'Connor was Executive Director at Community Counseling Service (CCS), a well-regarded international fundraising firm. There he implemented and managed comprehensive campaigns for several major educational and healthcare institutions. Earlier positions included teaching at the St. John's Senior Secondary School in Uganda, East Africa and serving as a Mombusho English Fellow in Kyoto, Japan. O'Connor was awarded the St. John's University International Medal in 2001 for his humanitarian services in Uganda and Japan.

O'Connor graduated with a B.A. in English Literature from St. John's University in Jamaica, New York, where he was a member of the Skull and Circle Honor Society and the recipient of a four year baseball scholarship. He received an M.A. in English Literature, with a concentration in Medieval and Renaissance literature, from St. John's three years later, and earned his Ph.D. in educational leadership and policy from the University at Buffalo, State University of New York in 2007. O'Connor completed Harvard University's Institute for Educational Management certificate program in 2010.

O'Connor and his wife Monica live in the Annapolis area with their four sons and one daughter.



**Dena M. Patterson**

**Campaign Director and Principal Gift Officer**

Dena Patterson, Campaign Director Principal Gift Officer, joined the Foundation as a Major Gifts Officer in September 2012 from Loyola University Maryland where she spent seven years, most recently as Director of Development for Loyola College of Arts and Sciences and the School of Education. Previously, she served as an assistant director of undergraduate admissions and a field hockey coach at Monmouth University.

At the Foundation, Patterson is primarily responsible for supporting the Executive Vice President and Major Gifts staff in cultivating, soliciting, and stewarding prospective donors who have the capacity to make transformative gifts to the Academy. Patterson also supports the Executive Vice President in managing the Foundation's current comprehensive campaign and leadership volunteer efforts.

Patterson holds a Bachelors degree in business management from Bucknell University, an M.B.A. from Monmouth University, and a Masters in Liberal Studies from Loyola University Maryland. Patterson currently serves on the Bucknell University Alumni Association Board of Directors and the Development Committee at the Riverbend School in Natick, MA. She previously served on the USA Field Hockey Nominating Committee.

Patterson works remotely for the Foundation and resides in Natick, MA with her husband Brian and daughter Hadley Grace.

## **CANDIDATE QUALIFICATIONS AND QUALITIES**

The successful candidate for the position of Major Gifts Officer—California will have

- experience in a centralized frontline fundraising position with a record of success closing six and seven figure gifts;
- experience in a highly structured, metrics-driven university development setting;
- experience in a regionally-based campaign;
- maturity, confidence, and experience in developing and executing personalized development strategies for major gift prospects;
- basic familiarity with planned giving vehicles;
- principled view of the world and the confidence to make decisions guided by honesty, integrity, and trustworthiness;
- strong commitment to and a broad understanding of the principles related to donor centered philanthropy;
- ability to write and speak articulately and passionately about the values and opportunities related to philanthropic giving;
- aptitude for complex fundraising or sales database systems, preferably experience in Blackbaud CRM or similar systems;
- bright and creative intellect, maturity, and ability to flourish in a collaborative environment;
- ability to think and plan strategically;
- willingness to travel 60-70 days per year;
- ability to effectively work remotely;
- sincere and enthusiastic belief in the mission of the United States Naval Academy; and
- energy, work ethic, stamina, enthusiasm, and humility.

A Bachelor's degree from an accredited college or university is required for this position as is a minimum of three years of successful professional experience in fundraising, business development, marketing, sales or a related position interacting with high net worth individuals and a clearly demonstrated path of professional performance showing increasing responsibility and achievement. Higher education, service academy, and/or military experience is preferred.

## **SALARY & BENEFITS**

The United States Naval Academy Foundation offers a competitive benefits package.

## **LOCATION**

This position is based in California, with San Francisco and Los Angeles as preferred geographic locations. The successful candidate will work remotely.

## DIVERSITY AND INCLUSION

The United States Naval Academy is 100% committed to leading an organization where all are treated with dignity, respect, and afforded equal opportunity that allows everyone to reach their full potential without regard to race, color, religion, gender, disability, age, or national origin.

## APPLICATION DEADLINE

All applications must be accompanied by a cover letter and résumé. Before submitting your materials, please read them over for accuracy. Review of applications will begin immediately and continue until the successful candidate has been selected.

*To nominate a candidate, please contact Angelique Grant: [angelique@aspenleadershipgroup.com](mailto:angelique@aspenleadershipgroup.com).*

*All inquiries will be held in confidence.*

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