

**UC Santa Cruz
Scotts Valley, CA Remote / Hybrid. Must reside in California**

Executive Director of Gift Planning

Budgeted Salary: \$135,000 - \$170,000/year. Salary commensurate with skills, qualifications and experience.

JOB SUMMARY

The Executive Director of Gift Planning, will serve as a central senior development officer with responsibility for leading, developing, organizing, and marketing planned giving to serve campuswide UCSC goals. Reporting to the Associate Vice Chancellor of Development and working closely with the Vice Chancellor for University Relations, the Directors of Development, and other Principal Officers for the campus, the Executive Director of Gift Planning will cultivate and solicit outright and planned major gifts; prepare written proposals; make oral presentations to planned giving prospects; and recruit effective fund-raising volunteers from among alumni and friends of UCSC. Job duties will require frequent travel by both car and airplane.

Planned Giving is a development field that is focused on raising major gifts, and includes providing special knowledge and technical expertise related to donor estate planning, and asset management. Planned Giving can cover a variety of complex gift transfers and may be defined generally as any gift that requires assistance by a qualified professional to complete. The most common planned gifts are made through a will or a trust such as a charitable remainder trust or a charitable lead trust. Other Planned Gift vehicles include gift annuities, gifts of life insurance, or gifts through pooled income funds. Assets donated through Planned Giving may include appreciate securities, real estate, tangible personal property (such as works of art or collections), retirement assets, or cash.

JOB DUTIES

50% - Identify, cultivate, and solicit donors for major and planned gifts, with fund raising attainment goals established annually.

- With faculty, volunteers and staff, identify new sources of potential major and planned gift support. Identify, create, and execute cultivation and solicitation strategies with specific timetables for individuals and prospects, working with the deans, faculty, volunteers, and staff to increase and enhance the institution's participation and success in private fundraising.
- Develop and actively manage a base of prospective planned and major gift donors. Utilizing the campus Alumni, Donor and Friends System (ADFS) database system, direct activities related to maintaining appropriate information and reports on planned gifts and expectancies.
- Solicit and complete planned gifts to UCSC. Apply expert knowledge of charitable gift planning techniques, tax law and regulations, and university planned giving opportunities to maximize private support for the campus. Apply thorough knowledge of the UC master charitable remainder trust drafting system, pooled income fund program, charitable gift annuity program and related policies and procedures to secure life-income gifts. Solicit and complete gifts through bequests, life estate agreements, charitable lead trusts, life insurance policies, retirement plans and other arrangements. Assures that gifts are solicited and received in accordance with university policies and guidelines.
- Build and maintain relationships with professional advisors such as attorneys, accountants, trust officers, and financial advisors in order to encourage gifts to UCSC, and to assist donors in incorporating appropriate gift provisions in their financial and estate plans. Utilizing specialized planned giving software, prepare gift proposals for donors and their advisors, tailoring the gift plan to each donor's requirements.
- Participate in planning for and implementation of the first comprehensive campus-wide fundraising campaign including organization and management of campaign volunteers, faculty, and administrators in support of planned and major gift efforts at UCSC. Devise timetable and goals for successful solicitation of individuals through outright and deferred gifts in support of the campaign.

20% - Create and manage a marketing and stewardship program for donors who have created revocable and irrevocable gifts that will be received by the University in the future.

- Develop and implement planned gift-marketing programs for the campus in conjunction with the decentralized gift activity centers. Monitor and evaluate progress toward goals of the marketing program including efforts via direct mail, telephone, seminar presentations, and personal solicitation.
- Work closely with the Stewardship Office to devise and implement a stewardship program for Planned Gifts to assure regular contact with donors through donor recognition societies including the 21st Century Club, annual reports, scholarship and fund reports, and various stewardship and cultivation activities and events.
- Develop giving opportunities, case statements, campaign materials, and proposals soliciting planned gift support for the campus. Oversee preparation and publication of brochures, pamphlets, newsletters, proposals, and coordinate preparation of such materials with the campus Development and Publications Offices.
- Develop strategies, plan, and coordinate special planned gift outreach events to identify and expand the base of potential donors and supporters of UCSC.

20% - Through trainings, individual consultations, and networking with faculty and staff, serve as the university's expert for technical gift issues related to life-income gifts, wills and trusts, estate planning, and current gifts of non-liquid assets.

- Under the general direction of the Associate Vice Chancellor of Development, the Director of Gift Planning is responsible for attracting significant private support to the University of California, Santa Cruz through the strategic design and implementation of an effective planned giving program aligned with the academic priorities of the campus. The incumbent will establish long-range goals and objectives for the planned gift program, preparing annual operating plans with timetables designed to achieve these goals and objectives approved by the Associate Vice Chancellor of Development.
- Serve as the Office of Gift Planning's chief training and marketing officer.
- Provide campus liaison and fundraising guidance in planned giving to a variety of campus constituents. Develop and present planned giving information to university staff, faculty, alumni, donors, prospects and other external constituencies (e.g., friends groups).

10% - Management and Leadership

- Prepare an annual business plan for inclusion in University Relations' overall plan.
- Prepare and manage the development budget for the Planned Gift Office in coordination with the Associate Vice Chancellor of Development.
- Act as representative of the Associate Vice Chancellor of Development and the Vice Chancellor for University Relations concerning major and planned gifts.
- Supervision of support staff including; hiring, training, providing direction, making assignments, evaluating performance and taking disciplinary action, if necessary.
- Establish and maintain unit goals and monitor workflow to ensure effective communication.
- Prepare and present policies, reports and/or procedures related to planned giving to campus administration and the UC Santa Cruz Foundation Board of Trustees. Recommend specific planned gifts for solicitation and Foundation approval.
- Serve as a key member of the campus major gifts committee and senior development team. Actively participate in development task forces.

REQUIRED QUALIFICATIONS

- Bachelor's degree in related area and / or equivalent experience / training.
- Substantial, progressively responsible development experience, preferably in higher education or equivalent experience in financial management or trust administration.
- Solid knowledge of planned giving instruments in a non-profit setting or financial planning/trust administration.
- Thorough knowledge of current tax laws and their implication on planned giving and estate planning, as well as legal and financial aspects of charitable contributions that is consistent with knowledge obtained through the successful completion of a Juris Doctor degree.
- Demonstrated ability to conceptualize and implement sophisticated fundraising strategies for the successful cultivation and solicitation of major gifts using planned giving techniques.

- Experience and/or ability to design, implement, and market a comprehensive planned giving program.
- Demonstrated knowledge of the full spectrum of development principles and activities including gift policies, solicitations, stewardship, donor recognition, administration, working with high-level volunteer committees, and the ability to apply this knowledge creatively to specific fund-raising projects.
- Superior written, oral, and interpersonal skills and the ability to communicate effectively with donors, donors' financial and legal advisors, volunteers, and colleagues, including people of differing temperaments, socioeconomic backgrounds and political/ethical philosophies. Ability to express concisely and persuasively the mission of the University and the fund-raising goals of the campus.
- Ability to create and sustain donor trust and relationships among a broad donor constituency including high-wealth individuals.
- Ability to listen carefully to what people are saying and translate their interests and resources into gifts needed by the university.
- Thorough knowledge and understanding of a university setting, its people and programs, as well as its educational and fundraising objectives.
- Demonstrated ability to successfully ask for volunteer support and to organize and motivate the efforts of volunteers.
- Supervisory skills to direct, guide, and evaluate the efforts of support staff.
- Ability to work independently with minimal supervision as well as to serve as a key member of the development team.
- Ability to function effectively and independently in a complex organizational setting with discretion, patience, flexibility, enthusiasm, and humor.
- Experience using planned giving software programs, e.g. Crescendo or PG Calc.

SPECIAL CONDITIONS OF EMPLOYMENT

- Selected candidate will be required to pass a pre-employment criminal history background check.
- Ability to work long periods of time at a computer with or without accommodation.
- The selected candidate will be required to work primarily on campus, with periods of remote work possible based on operational needs, and be able to fulfill requirements of the UCSC telecommuting agreement.
- Will be required to work a hybrid work schedule, days of the week and number of days to be determined, and be able to fulfill requirements of the UCSC telecommuting agreement.
- Ability to work a variable schedule including evenings and weekends.
- Ability to travel to multiple work locations on and off campus.
- Ability to travel within a defined regional or service area.
- Ability to maintain appearance and conduct suitable for working in a professional setting.
- The University of California has implemented a COVID-19 Vaccination Policy covering all employees. To be compliant with the policy, covered employees must submit proof of vaccination or have an approved exception or deferral, eight (8) weeks from date of hire.
- Per the Child Abuse and Neglect Reporting Act (CANRA), this position has been identified as a Mandated Reporter. The selected candidate will be required to report known or suspected child abuse or neglect as defined by CANRA and will be required to sign a Statement Acknowledging Requirement to Report Child Abuse prior to commencing employment. CANRA Penal Codes, and related definitions, requirements, and responsibilities may be obtained here.

SAFETY STATEMENT

All UCSC employees must understand and follow job safety procedures, attend required health and safety training, proactively promote safety at work, and promptly report actual and potential accidents and injuries.

HOW TO APPLY

Attach your resume and cover letter when applying for this job opening.

Apply Online:

<http://50.73.55.13/counter.php?id=254288>

The University of California is an Equal Opportunity/Affirmative Action Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, age, or protected veteran status. UC Santa Cruz is committed to excellence through diversity and strives to establish a climate that welcomes, celebrates, and promotes respect for the contributions of all students and employees.