

## **Director of Planned Giving, University of California, Irvine**

### **UNIVERSITY OF CALIFORNIA, IRVINE**

#### **University Advancement**

In a relatively short period of time, the University of California, Irvine has achieved tremendous success. A top-ten public university, UCI has become internationally-recognized for improving lives through research and discovery, fostering excellence in scholarship and teaching, and engaging and enriching the community. And, with plans for major campus growth and a comprehensive campaign during the next decade, the future is even brighter... The university is seeking experienced, innovative development professionals to lead our fundraising efforts at a time of great excitement and opportunity for the campus and University Advancement.

#### **Director of Planned Giving**

Under the general direction of the Senior Executive Director of Development, The Shaping the Future Campaign, the Director of Planned Giving will identify, cultivate, and solicit major outright and deferred gift prospects, particularly those whose gifts involve complex tax and investment planning considerations; market various deferred and outright gifting techniques to various internal and external audiences, provide leadership and technical assistance to donors, professional advisors, volunteers and University Advancement colleagues regarding the tax and financial aspects of charitable giving; and, as requested by the Executive Director, complete other projects enhancing the University of California, Irvine's ability to secure a greater number of high-value major outright and deferred gifts.

We offer competitive salary ranges, excellent benefits—including a minimum of three weeks of vacation per year—and career advancement opportunities. To be considered for this position, please apply directly at: [www.hr.uci.edu](http://www.hr.uci.edu) and search by job number 2012-0030.

UCI is an equal opportunity employer committed to excellence through diversity. UCI Human Resources, 111 Theory, Suite 200, Irvine, CA 92617.

#### Job Requirements

Identifies, researches, contacts, cultivates, solicits and stewards deferred and outright gift donors, with an initial goal of 120 face to face visits per year.

In conjunction with the Senior Executive Director of Development, develop a planned giving program focused on securing the following type of gifts: all forms of life income gifts, retained life estate gifts, charitable lead trusts, bargain sale gifts and revocable gift commitments such as will bequests and beneficiary designations for retirement plans and life insurance policies.

Prepare timely and complete gift proposals and illustrations, transfer documents, bequest language and other gift agreements to secure major outright and deferred gifts.

Develop a comprehensive centralized marketing program for purposes of promoting legacy planning internally and externally. Creatively think of ways to engage prospects in the legacy planning process.

Work with prospect and their professional advisors, as well as with academic leaders, other development staff and volunteers to develop appropriate solicitation and gift strategies. Cultivate and steward relationships with established donors.

Consult with donors' advisors responsible for the completion of gift agreements. Informs the tax, legal and financial advisors of the university policies for planned gifts. Assist prospective donors and their advisors in clarifying objectives, obtaining and recording pertinent information.

Support school/college/program-based efforts to promote complex outright and deferred gifts by assuming leadership role in devising various marketing plans to each unit. Help implement and evaluate outreach efforts to various audiences. Team with unit based development staff to secure deferred and complex outright gifts. Help train and mentor central major gift officers and unit- based development staff in legacy planning techniques and strategies.

Staff meetings of the Planned Giving Advisory Council, a high profile volunteer board consisting of attorneys, accountants, financial planners, bank trust officers, chartered life underwriters and other professional advisors. Plan agendas, coordinate and help supervise the meetings and activities of the Board.

Develop and implement special events and programs designed to identify prospective donors, train the professional community and to market the university giving opportunities. These programs include prospective donor seminars, professional workshops, and seminars geared to key target markets.

Where appropriate or necessary, seek counsel and approval from the General Counsel Office of the Office of the President regarding legal matters affecting the fundraising activities of the Office of Planned Giving.

Prepare and implement a plan of action on an annual basis. Report bi-weekly to the senior executive director regarding progress toward goals, successes, problems, etc. At all times participate in decisions regarding the administrative and programmatic aspects of the legacy planning program.

Be an active and conscientious participant in the Prospect Tracking System. Fully document contact with donors and prospective donors through the established prospect management system within the ADVANCE database.

In consultation with the Senior Executive Director, supervision is exercised over support staff in the Office of Planned Giving.

Other duties as assigned by the Senior Executive Director of Development.

### Relationships

Accountable to the Senior Executive Director of Development for the management of assigned responsibilities.

Advises, informs, and works with the Directors of Development, Assistant Vice Chancellors, Vice Chancellors, the Chancellor, Executive Vice Chancellor, Deans, Directors, and faculty.

Represents the University to outside constituents, as appropriate.

Works with the Vice Chancellor, Senior Executive of Development, Assistant Vice Chancellors, Executive Directors of Development, Directors of Development, and other Advancement managers to develop and coordinate fundraising solicitations, as appropriate, and in accordance with university policies for the solicitation and acceptance of gifts.

Maintains effective working relationships with other departments in University Advancement.

Enlists the involvement of Faculty, deans, directors, and other Campus administrators in their contact with volunteers and other donor prospects.

Works with General Counsel Office of the UC Regents Office of the President on legal matters pertaining to securing life income and complex outright gift arrangements.

### Scope

Responsible for department budget and compliance with all UCI policies and procedures.

### Skills & Knowledge

Excellent interpersonal skills and the ability to communicate effectively with a diverse and high-level group of individuals in a diplomatic, professional, engaging and creative manner.

Resourcefulness in finding appropriate solutions to problems and initiative in presenting alternatives and implementing solutions to ensure effective change. Ability to anticipate problems and take necessary action to eliminate or mitigate potential negative effects.

Ability to be flexible in working independently as well as collaboratively with Advancement and faculty and staff to achieve defined goals. Use initiative to organize and follow through with complex tasks to meet deadlines.

Skill to use a personal computer and computer software programs at the level of sophistication required for the development office. Proven ability to use MS Office Suite and database programs. Knowledge of Outlook, Word, Excel, and PowerPoint. Familiarity with the Internet and how to conduct searches.

Possess traits of good judgment, confidentiality and discretion in communicating with colleagues and constituents.

Must be a self-starter, consistently meet goals and deadlines, juggle multiple responsibilities simultaneously, and be able to exercise good judgment in working with highly sensitive information and with a diverse prospect population.

### Position Specific Skills and Abilities

A bachelor's degree and at least three years experience in planned or major gifts, or transferable skills and expertise from a related field, such as law, accounting, or financial services, is required. An advance degree, such as a J.D., CPA or MBA is preferred.

Must have general knowledge of estate planning, tax, and marketing principles and all forms of outright and deferred charitable gifts, be a proven team player, and possess exceptional analytical and evaluative, written and oral communication, interpersonal, organizational, marketing, administrative and computer skills.

Must also relate well and inspire confidence in and trust among older and/or prominent individuals, members of the academic community and those in the legal and financial services professions. Must be willing to travel.

A successful track record of marketing intangibles to educated and informed audiences.

Experiences in research and identification of individuals and community groups with potential for donor participation.

Experience in planning and implementing special events geared to cultivating and recognizing donors.

Ability to work effectively with high level administrators, volunteers, and corporate contacts.

Ability to work effectively in a team with other advancement senior staff in devising, analyzing, modifying, implementing and evaluating overall University Advancement program.