

Director of Major and Planned Giving

University of San Diego

Department: Planned Giving

Admin/Full-Time

Job IRC#26939

Job Description:

The director is responsible for promoting, managing, administering, and stewarding major and planned gifts to the University of San Diego by working with prospects, donors, development staff, and financial and legal advisors. Major gifts include those cash or property gifts of \$25,000 or more. Planned gifts include those gifts, whether given currently or deferred, that require the assistance of a professional staff person, qualified volunteer, or the donor's advisors to complete the gift, and any gift which is carefully considered by a donor in light of estate and financial plans. Additionally, the director works with senior alumni coordinating 50th reunion and Golden Torero events. This position receives general guidance and direction from the associate vice president for Development. This position directly supervises the Office of Planned Giving's staff, including a marketing coordinator and an executive assistant.

Essential Duties and Responsibilities:

The responsibilities described here are representative of those that must be met by the employee to successfully perform the essential functions of this job.

Major and Planned Giving Program Management

- Oversee, manage, and evaluate all aspects of the major and planned giving program including the establishment of appropriate policies and procedures, preparation and administration of annual program budget, and evaluation of the effectiveness of the major and planned giving program.
- Initiate, cultivate, and solicit major and planned gifts for USD. Actively cultivate a portfolio of major and planned giving donors while working closely with directors of development, faculty and other university personnel throughout USD to assist them with planned giving prospects and act as planned giving liaison and support.
- Maintain frequent contact with donors, prospective donors, and their legal and financial advisors who are interested in charitable trusts, gift annuities, other planned gifts, gifts of real estate, artwork, and other unusual assets.
- Formulate cultivation and solicitation strategies for major and planned gift prospects and assist other university fundraisers in implementing these strategies. In particular, care should be taken to match donors' financial needs and philanthropic concerns with the appropriate gift vehicle and designation while balancing the motivations of donors with the needs of the university.
- Fully comply with the university's prospect management / move management system including the filing of donor/prospect Contact Reports.

- Advise donors on the transfer of assets and the ramification of using different types of assets to fund planned giving vehicles. When discussing tax and legal issues with donors, prospects, and their advisors, provide information; however, emphasize that the university is not providing legal or financial advice on their behalf.
- Draft necessary documents and agreements between USD and donors as required for their gifts while keeping in mind any potential for conflict of interest (charitable gift annuity agreements, property agreements, assignments of personal property, etc.). Donors should be directed to seek advice from their own legal representatives.
- Review legal documents generated by outside counsel for accuracy and completeness and take necessary action or direct other outside counsel to do so. Supervise outside counsel in their drafting of wills and trust documents (both charitable remainder trusts as well as living trusts) on behalf of donors to USD.
- Monitor executors'/trustees' administration of estates of which USD is a beneficiary. Monitor estates throughout the probate process to ensure that the proceedings are efficient and USD's interests are well represented.
- Maintain Pending Estates files.
- Monitor the fiduciaries acting as trustees or advisors to assure that administration of charitable remainder trusts conforms to federal and state laws. Periodically review trust, gift annuity, and pooled income fund accountings and investment performance. Assist trustors with their interactions with third party trustees, especially when changing trustees.
- Monitor any settlement negotiation, litigation, or conflicts regarding planned gifts. Supervise and coordinate with appropriate general counsel and outside legal counsel to protect the interests of USD.
- Maintain accurate and complete records (legal, financial, and general correspondence) of all planned giving transactions, major gifts, and pending estates and ensure that all known planned gifts are in compliance with all applicable federal, state, and university laws, policies, and procedures.
- Maintain strong relationships with the Office of Finance and Administration as well as the Office of Budget and Treasury. Prepare necessary finance reports for the annual audit.
- Educate members of the community, alumni, parents, volunteers, faculty, current donors and prospects about planned giving by marketing the planned giving program through personal contacts, seminars, luncheons, newsletters, advertising, referrals and mailings.
- Develop and maintain relationships with the professional community to cultivate charitable gift referrals. Establish, maintain and cultivate the Planned Giving Council.
- Advise and educate USD personnel and volunteers about major and planned giving issues, with specific regard to legal requirements and consequences of non-compliance. Work with USD personnel and volunteers to help them include planned or blended gifts in their solicitations and assist with prospects when appropriate.

- As a member of USD's Gift Acceptance Committee, assess all potential gifts subject to review. Assist USD personnel with legal requirements for acceptance, management, and disposition of real estate, limited partnership interest, closely-held and restricted stock, and non-cash gifts.
- Prepare annual reports, in cooperation with the Accounting Department, required for the Department of Insurance annual gift annuity report.
- Maintain a high level of knowledge of current planned giving techniques and relevant laws including areas of taxation, trusts and estates, probate, corporations, partnerships, other business entities, non-profit organizations, contracts, and real estate.

Bridges Academy and Puente de Oro Management

- Steward major and planned giving donors, including those who have made revocable and irrevocable gifts. Host annual recognition event for Puente de Oro Society members.
- Act as director of the Bridges Lectureship. Host Bridges events to develop good relationships with members whose profiles indicate they may be good prospects for planned giving. Develop programming for fall and spring semesters. Introduce and promote the concept of philanthropy to Bridges attendees. Supervise the Bridges Lectureship coordinator in his/her responsibilities.

50th Reunion and Golden Torero Management

- Plan and implement each 50th reunion with some assistance from the Office of Alumni Relations. Includes assembling and working with the committee, maximize attendance, event scheduling, creation of new events and dropping of others to improve the reunion experience, control the office budget, encourage class gifts, and cultivate lasting relationships to the extent possible.
- Manage the Golden Toreros alumni group. Golden Toreros are alumni who have reached their 50th reunion year.
- Maintain and grow the Golden Toreros Committee.
- Coordinate the annual Golden Toreros reunion on Homecoming & Family Weekend.
- Use creativity and a minimum of well-chosen events that will make this group grow in size and afford these alumni to reconnect with each other and the university.
- Promote major and planned gifts to the Golden Toreros Scholarship Endowment and other USD priorities.
- Cultivate relationships with Golden Toreros to the fullest extent possible.

Qualifications:

- Bachelor's degree required; graduate degree in law or finance preferred.
- Seven years of experience in planned giving, major gifts, or its equivalent in professional level activity in financial planning, law, trust work, etc.

- In-depth knowledge of tax and other legal aspects of planned giving.
- Ability to interpret and apply laws and regulations to all aspects of charitable giving, planned gift structuring, and trust administration.
- Demonstrated ability to cultivate, solicit, close, and steward major outright and planned gifts.
- Demonstrated success in accomplishing objectives by collaboratively working with others.
- Excellent oral and written communication skills, including public speaking.
- Ability to conceptualize and articulate in clear and simple language the economic concepts underlying charitable gifts, such as present and future values, compounding, and risk.
- Strong professional interpersonal skills and demonstrated ability to work well with planned giving constituencies: donors from different backgrounds, attorneys, financial advisors, and university officials.
- Understanding of and adherence to the Model Standards of Practice for Charitable Gift Planners.
- Protect confidentiality in all communications regarding proposed and consummated gifts.
- Willingness and ability to work evenings and weekends.
- Willingness and ability to travel.

Performance Expectations: Knowledge, Skills & Abilities

- Commitment to working as a member of a team and collaborate with colleagues.
- Demonstrated ability to inspire confidence, to motivate, and to persuade.
- Strong sense of integrity and ethical conduct.
- Ability to anticipate, recognize, and solve problems.
- Ability to organize time effectively, establish priorities, and manage a large number of tasks simultaneously.
- Knowledge of USD's policies and procedure
- Ability to set and meet goals.
- Knowledge of Microsoft Office applications.

Background check: Successful completion of a pre-employment background check.

Degree Verification Requirement: Persons offered employment in this position will be required to provide official education transcripts for degree verification purposes.

Salary: Commensurate with experience; Excellent Benefits.

The University of San Diego offers a very competitive benefits package, to include medical, dental, vision, a 12% retirement contribution given to you by the University (with three year vesting period), and access to on-campus Fitness Centers. Please visit the benefits section of our website to view all of the perks and benefits that USD has to offer. USD: Human Resources: Benefits

Hours: 40 per week

Closing date: March 28, 2018

Note: External job postings will be up for at least five days. After that time, applications will be reviewed by the hiring manager/committee throughout the posting period. A candidate may be selected at any time which could then close this posting on a date earlier than listed.

The University of San Diego is an equal opportunity employer committed to diversity and inclusion and is especially interested in candidates who can contribute to the diversity and excellence of the campus community.

The University of San Diego is a smoking and tobacco-free campus. For more information, [visitwww.sandiego.edu/smokefree](http://www.sandiego.edu/smokefree).

Click <http://apptrkr.com/1182462> to complete our online application. In addition, please upload a cover letter and resume to your application profile for the hiring managers' review. If you have any questions or difficulties please contact the Employment Services Team at 619-260-6806, or email us at <mailto:hr@sandiego.edu>