

Director of Planned Giving - Health Sciences (20116B)

The Director of Planned Giving is responsible for identifying, cultivating, and soliciting prospects and current donors for the purpose of negotiating and closing various planned giving arrangements and major gifts. Responsibilities include working with donors, their advisors, other outside professionals, and the staff of Health Sciences and central development. University of Utah Health Sciences includes its colleges, hospital, and clinical departments. The Director of Planned Giving serves as the fundraising liaison to Health Sciences Directors of Development and is responsible for training and supporting them in working with donors on deferred and planned gifts such as trusts, charitable annuities, life insurance, real estate, wills, and bequests. This position works closely with the Director of Planned Giving in the central development office and reports to the Senior Executive Director of Health Sciences Development.

University of Utah Job ID# PRN20116B- 00972 - Advancement-Univ Utah Health

COMPENSATION: \$60,700-\$115,000

WORK SCHEDULE: Full-time, 40 hours/week, Monday through Friday, 8:00 AM to 5:00 PM. Ability to work evening and weekend hours, as necessary on short or limited notice. Frequent local travel expected. Travel beyond local area may be required.

RESPONSIBILITIES:

1. Supports the overall long-term financial strength and support of University of Utah Health Sciences by visiting with donors and prospective donors about a variety of gift possibilities, particularly deferred and planned gifts.
2. Works closely with the Senior Executive Director of Advancement and Associate Vice President of Health Sciences Development to develop strategies to build a portfolio of Health Sciences Planned Giving prospects and secure new planned gift commitments for Health Sciences.
3. Works with advancement staff to develop planned giving as a critical component of a strategic fundraising plan and accompanies staff, as needed, on face-to-face donor visits.
4. Writes all gift agreements for outright gifts, pledges, endowment and planned gifts.
5. Works, as needed, with central development's Director of Planned Giving to review and respond to policy and legal questions related to Health Sciences gift issues.
6. Coordinate with Health Sciences development staff and donors to complete gift agreements in a timely fashion; draft cover memos and coordinate with administrative staff to track routing, signature and distribution process for gift agreements.
7. Works with the Director of Development Communications and central development's Director of Planned Giving to develop digital and printed planned giving marketing materials as well as donor centric planned giving advertisements.
8. Interacts with mature major gift prospects/donors and members of the legal, accounting and financial planning communities.
9. Manages a portfolio of rated, planned giving prospects.
10. Enhances donor relations by representing Development at functions and meetings and working with donors, potential donors, alumni, patients, students and friends to strengthen their ties to University of Utah Health Sciences.
11. Offers seminars on planned and deferred gifts.
12. Remains abreast of current laws and regulations governing planned and deferred gifts through professional reading, developing contacts with colleagues, attending professional development courses, attending training and/or courses, and maintain appropriate professional memberships in organizations such as CASE and AFP.
13. Records all donor related activities in the donor database.
14. May supervise a planned giving graduate assistant.

QUALIFICATIONS:

Bachelor's degree in Business Administration, or related area, or equivalency; eight years of progressively more responsible management experience; and demonstrated leadership, human relations and effective

communications skills required.
Masters degree in Business Administration, or related area preferred.

PREFERENCES:

At least two year of experience working with donors on planned gifts. Three to five years is preferred.
Experience working with clinical fund raising staff and patient giving in a medical setting.
Knowledge of current laws regarding taxability of donations, familiarity with deferred giving strategies, and knowledge of a diverse array of financial instruments are preferred.
A Master's or Juris Doctorate degree or experience in nonprofit management.
Professional fundraiser certification.
Excellent writing skills, strong computer skills, proficiency in working with donor databases, demonstrated leadership, human relations, and effective communication skills.
Skilled in proofreading and editing, attention to detail, and follow-through.

PLEASE APPLY ONLINE THROUGH THE UNIVERSITY OF UTAH SYSTEM TO BE CONSIDERED FOR THIS JOB:

<http://utah.peopleadmin.com/postings/90829>

EQUAL EMPLOYMENT OPPORTUNITY: The University of Utah is an Affirmative Action/Equal Opportunity employer. Upon request, reasonable accommodations in the application process will be provided to individuals with disabilities. Please contact the Office of Equal Opportunity and Affirmative Action, 201 S. Presidents Cr., Rm 135, (801)581-8365 (V/TDD), for further information or to request an accommodation. The University of Utah is committed to diversity in its workforce. Women and minorities are encouraged to apply.