

**Director of Gift Planning**  
**Office of Trusts, Estates & Gift Planning**

**Overview:**

The Office of Trusts, Estates & Gift Planning serves as a central resource for the solicitation, closing and stewardship of planned gifts, including but not limited to, bequests, charitable trusts, charitable gift annuities, pooled income funds, University of Rochester Donor Advised Funds, publicly traded securities, real estate, closely held securities and other hard to value and illiquid assets. In a unique position among leading American Universities, the University Of Rochester Office Of Advancement offers a full complement of gift planning options with a strong internal infrastructure including Institutional Resources, Office of Finance, Gift and Donor Records specialized computer software programs from PG Calc, external custodial support from Northern Trust Co, external counsel from Nixon Peabody LLC and services of a nationally recognized planned giving consulting firm, PENTERA, Inc.

**Principal Duties:**

Reporting to and with guidance from the Executive Director of Gift Planning and in concert with advancement policies, and advancement leadership the Director of Gift Planning is primarily responsible for the identification, cultivation, solicitation, and stewardship of life income and estate gifts in support of the annual Gift Planning goal within a \$100M+ advancement organization. The Director will work with the Executive Director of Gift Planning and colleagues in the Gift Planning Office to advance the near and long term goals of the department; assist in executing the annual operating plan; and recommend new strategies to enhance overall fundraising efforts for the department. S/he will manage a portfolio of approximately 150 prospects consisting of University alumni and friends, and will focus primarily on cultivating and soliciting gifts of \$100,000+.

80% Donor Visits, Travel and Solicitation Activity:

- Complete a specified number of visits per year to include qualification, cultivation, solicitation, and stewardship visits.
- Prepare 35+ proposals from both proactively cultivated prospects and inbound marketing inquiries.
- Close minimum of 5 -10 new life income gifts.
- Identify/close minimum of 5-7 new documented bequest intentions.
- Recruit a minimum of 10 new Wilson Society members
- Build and manage a portfolio of 100 – 150 qualified prospects in first 3 years
- Create and document written strategies for prospects and proposals
- Work with colleagues in units and central major gifts to identify and support gift planning opportunities among respective portfolios

## 15% Pipeline Growth, Stewardship and working with Volunteers:

- Increase the overall pipeline of planned giving prospects
- Working with prospect management develop prospects with a wide range of giving capacity and engage them to close life-income gifts, bequests, and IRA gifts and outright gifts where applicable
- Work with professional advisors to enhance engagement with professional advisors, attorneys, and accountants to provide information on gift planning opportunities and vehicles
- Manage the Ambassadors in Gift Planning, a group of volunteers, typically members of the Wilson Society, who are willing to share their stories in print, online, at events and on visits with gift officers
- Serve as a liaison for Ambassadors in Gift Planning with central and unit gift officers
- Assist in working to expand the overall marketing program via operational leadership of specific gift planning marketing initiatives and working with donors to share their stories; conduct comprehensive stewardship which includes welcoming donors to the Wilson Society
- Support the Reunion Giving program via select milestone reunions for various schools
- Broaden the University gift planning program to new constituencies
- Draft gift planning proposals which require knowledge of life-income gifts, bequests, real estate, and tangible property along with the tax law implications for the donor of making such gifts
- Have a working knowledge of the University of Rochester's investment management strategy and asset allocation for charitable trusts
- Represent Gift Planning at events and meetings and will engage in regular travel to meet with prospects and donors.
- Other projects will be assumed as identified and assigned.

## 5% Engage in University of Rochester life, professional education and wider advancement functions

- Attend a professional development conference and or specialized software training annually and participate in gift planning related webinars as possible to keep current on legislation and best practices
- Maintain an advanced knowledge of gift planning and general advancement to be effective in service to internal and external clients
- Support of colleagues including through participation in training sessions
- Attend events as requested in support of Wilson Society and other activities like Meliora Weekend, reunions etc....

**Knowledge and Experience:**

- Bachelor's degree required, seven or more years of experience in a sophisticated advancement environment such as at a major research university, Gift Planning experience preferred
- Working knowledge of planned giving methods, tax laws and responsibilities of charities and donors
- Strong track record of success soliciting and closing major and planned gifts
- Familiarity with software such as PGCalc and able to work in proprietary systems of vendors and other partner offices
- Sophisticated understanding of "moves management" and annual, major, leadership, principal gift fundraising in a donor-centric environment
- Desire to work as part of a team in a complex organization
- Strong listening skills and demonstrated ability to work with mature constituents
- Desire to help charitably minded individuals meet their philanthropic objectives through creative ways of giving

**Skills and Abilities:**

- Able to see and understand the objectives of the advancement program and all divisions of the University Advancement Office, and to integrate their goals with those objectives
- Able to work closely with highly motivated and fast moving leadership and staff
- Ability to initiate, innovate, analyze, monitor, evaluate and advance strategic advancement plans
- Ability to communicate effectively, speaking and in writing
- Ability to patiently multi-task in times of high-pressure
- High Energy, attention to detail, listening skills, confidential, credible and trustworthy, excellent judgement, self-actualized
- Sense of humor and a desire to enjoy working in an environment of intelligent, highly motivated individuals
- Excellent skills in developing and maintaining strong relationships with donors

**Other Characteristics:**

Personal belief in the mission, goals and objectives of the University of Rochester and a personal commitment to Advancement's core values:

- Innovation, Team-Based Approach, Inclusion, Service Excellence, Mission Driven, Communication, Integrity and Job Satisfaction