

**JOB INFORMATION**

Effective Date	7/15/2022
Job Code:	2291
Job Title:	Director, Planned Giving/Major Gifts
Salary Grade/Structure:	080 - Admin-Professional
Career Level Name:	M3 - Middle Manager
FLSA Name:	Exempt
EEO Code:	30-Professional Non-Faculty
Job Function:	Development
Job Family:	Fundraising
Job Summary	The Director serves as a leader and technical advisor within the Office of Institutional Advancement. Reporting to the Vice President, the Director builds and manages a portfolio of prospective major and legacy giving donors. In addition to direct cultivation, solicitation, and stewardship of donors, the Director provides oversight and expert guidance on all aspects of planned giving. The Director creates planned giving programs, materials, and policies; serves as a liaison to the Division of Finance and Administration, UH-System, external estate and real estate legal counsel; and provides training and technical assistance to UA staff.

**COMPETENCIES**

Competencies

Please refer to the UHCL Human Resources webpage for UHCL core competencies for all eligible job levels.

**QUALIFICATIONS**

Education

Education Level	Education Details	Required/Preferred	
Bachelor's Degree	Degree in Finance, Marketing, or Communications.	Required	
Master's Degree	Master's or JD degree.	Preferred	

Work Experience

Experience	Experience Details	Required/Preferred	
Progressive	Minimum five years in planned giving fundraising experience with a high level of knowledge and expertise in areas of estate and financial planning fundamentals.	Required	
Some	Higher education fundraising experience.	Preferred	

## Licenses and Certifications

Licenses/Certifications	Licenses/Certification Details	Time Frame	Required/Preferred	
	Active membership or past/current leadership in Gift Planning association(s).		Required	

## Knowledge, Skills and Abilities

KSAs	Proficiency
• Demonstrated success in securing major and planned gifts or verifiable track record of soliciting individuals for financial investments.	Skilled
• Above average knowledge of financial and estate planning, charitable giving tax laws, and planned giving strategies.	Skilled
• Knowledge of higher education development strategies and fundraising ethics and best practices.	Skilled
• Skilled in utilizing Microsoft Office Suite.	Proficient
• Skilled in using Blackbaud, Advance, or similar advancement platforms (CRMs).	Proficient
• Excellent planning and organizing skills and ability to prioritize to meet deadlines.	Skilled
• Ability to meet high standards of accountability, initiative, integrity, and focus in a rapidly changing and intellectually stimulating environment.	Skilled
• Able to solve complex problems and remove roadblocks to success.	Skilled
• Must also be detail-oriented, well-organized, focused and goal-oriented, with a high level of initiative. Excellent written and oral communication.	Skilled
• Strong collaboration skills and demonstrated ability to effectively adapt to diverse audiences.	Proficient

## JOB RESPONSIBILITIES

Campus Security Authority

Remote Work Capable

## Essential Functions

Essential Function	% TIME
• Evaluate alumni data to understand philanthropic characteristics and capacity; utilize findings to develop a strategic plan of action with objectives and timelines to create a robust PG-prospect portfolio.	10%
• Develop marketing and communication strategies using in-depth knowledge of estate, tax, financial planning and wealth management to engage prospects by sharing university highlights, conveying plans for a milestone anniversary in 2024, and future impacts of UHCL in the region and beyond.	10%
• Design annual PG prospect portfolio (75-100 six-seven figure prospects) through collaboration with other development team members. Plan virtual and in-person visits when appropriate, to familiarize prospects with UHCL priorities and align donor interests. Create process to engage university leaders in the solicitation process when appropriate. Report on outcomes quarterly and annually.	15%
• Develop stewardship activities and a UHCL-centric legacy club that includes communications and main event(s) annually to celebrate commitments. Functions include, but are not limited to, thank you communications, donor recognition events (may be supported by Special Events), and other stewardship opportunities.	10%
• Coordinate and participate in activities and events developed by UA teams designed to promote the university; network with prospective donors and influencers, and advance common fundraising objectives.	10%
• Develop and implement a plan detailing planned giving/UHCL priority opportunities, highlighting impact on the university and external constituents. Serve as an advocate for UHCL giving programs to staff, faculty, and prospective donors. Contribute content for annual reports and other special reports throughout the year.	10%

## Essential Functions

Essential Function	% TIME
<ul style="list-style-type: none"> <li>Solicit and secure major and planned gifts, involving University leadership, faculty, and program staff, as appropriate. Promote the benefits of blended gifts, which include both an outright and estate gift component, to achieve greater and more immediate philanthropic impact.</li> </ul>	15%
<ul style="list-style-type: none"> <li>Develop and maintain stewardship plans for individual families and donors, as well as recognition programs or legacy societies for all planned giving donors.</li> </ul>	10%
<ul style="list-style-type: none"> <li>Create annual and long-term marketing plans, legacy donor profiles, and educational outreach meetings, materials and activities.</li> </ul>	5%
<ul style="list-style-type: none"> <li>Other related duties as assigned.</li> </ul>	5%

## PRE-EMPLOYMENT

MVR:	No
Criminal History:	Yes
Physical Exam:	No
Hearing Exam:	No
Pulmonary Function Test:	No

## PHYSICAL DEMANDS/WORKING CONDITIONS

Office and Administrative Support

### Physical Demands

Physical Demand	N/A	Rarely	Occasionally	Frequently	Constantly	Weight
Standing			X			
Walking			X			
Sitting					X	
Lifting		X				
Carrying		X				
Pushing		X				
Pulling		X				
Climbing		X				
Balancing		X				
Stooping		X				
Kneeling		X				
Crouching		X				
Crawling		X				
Reaching		X				
Handling			X			
Grasping			X			
Feeling		X				
Talking					X	
Hearing					X	
Repetitive Motions				X		
Eye/Hand/Foot Coordination				X		

### Working Environment

Working Condition	N/A	Rarely	Occasionally	Frequently	Constantly
Extreme cold		X			
Extreme heat		X			
Humidity		X			
Wet		X			
Noise			X		
Hazards		X			
Temperature Change		X			
Atmospheric Conditions		X			
Vibration		X			

### Travel Requirements

Estimated Amount	Brief Description