

Deputy Director, Office of Gift Planning (0464U),
University Development and Alumni Relations - 70506
University of California, Berkeley

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Posted Jul. 31, 2024, set to expire Nov. 27, 2024

Job Title	Deputy Director, Office of Gift Planning (0464U), University Development and Alumni Relations - 70506
Department	University Development and Alumni Relations
Institution	University of California, Berkeley Berkeley, California
Date Posted	Jul. 31, 2024
Application Deadline	Open until filled
Position Start Date	Available immediately
Job Categories	Associate/Assistant Director
Academic Field(s)	Development/Institutional Advancement
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Job Description	

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**Deputy Director, Office of Gift Planning (0464U), University Development and Alumni Relations -
#70506**

Job ID
70506

Location
Main Campus-Berkeley



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About Berkeley

At the University of California, Berkeley, we are committed to creating a community that fosters equity of experience and opportunity, and ensures that students, faculty, and staff of all backgrounds feel safe, welcome and included. Our culture of openness, freedom and belonging make it a special place for students, faculty and staff.

The University of California, Berkeley, is one of the world's leading institutions of higher education, distinguished by its combination of internationally recognized academic and research excellence; the transformative opportunity it provides to a large and diverse student body; its public mission and commitment to equity and social justice; and its roots in the California experience, animated by such values as innovation, questioning the status quo, and respect for the environment and nature. Since its founding in 1868, Berkeley has fueled a perpetual renaissance, generating unparalleled intellectual, economic and social value in California, the United States and the world.

We are looking for equity-minded applicants who represent the full diversity of California and who demonstrate a sensitivity to and understanding of the diverse academic, socioeconomic, cultural, disability, gender identity, sexual orientation, and ethnic backgrounds present in our community. When you join the team at Berkeley, you can expect to be part of an inclusive, innovative and equity-focused community that approaches higher education as a matter of social justice that requires broad collaboration among faculty, staff, students and community partners. In deciding whether to apply for a position at Berkeley, you are strongly encouraged to consider whether your values align with our Guiding Values and Principles, our Principles of Community, and our Strategic Plan.

At UC Berkeley, we believe that learning is a fundamental part of working, and our goal is for everyone on the Berkeley campus to feel supported and equipped to realize their full potential. We actively support this by providing all of our staff employees with at least 80 hours (10 days) of paid time per year to engage in professional development activities. To find out more about how you can grow your career at UC Berkeley, visit grow.berkeley.edu.

Departmental Overview

University Development and Alumni Relations (UDAR)

University Development and Alumni Relations (UDAR) helps build Berkeley's excellence through communications, public outreach, and fundraising, all to raise public awareness about Berkeley and increase private philanthropy. UDAR provides overall direction for the campus's philanthropic advancement strategies and strengthens campus unit development in partnership with campus

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fundraisers. It handles a range of central activities and services encompassing prospect development, communications, donor stewardship, gift management, data management, and more.

Office of Gift Planning and Position Overview

The Office of Gift Planning conducts and oversees gift planning fundraising for the entire campus. Working with hundreds of donors on a variety of outright, life income, and estate gifts and bequest commitments, each year the office partners with colleagues across the campus on more than \$120 million in new gifts.

This position reports directly to the Executive Director for the Office of Gift Planning. The position involves designing, developing, delivering, and administering fundraising programs. Identifies new donor prospects through researching background information on potential donors and developing materials, marketing plans, and organizing related programs / events; cultivates, stewards, and may solicit donor prospects.

The Deputy Director, Office of Gift Planning, supervises senior and junior gift planning officers and/or other gift planning team members. Identifies new prospects/donors through acting as senior liaison to assigned campus unit fundraisers and via responding to Office of Gift Planning generated inquiries. Responsible for closing many of campus' most complex and deferred gifts. Annual fundraising goals of \$2M outright/life income gifts and \$10M bequest gifts (at least one-half of which are recordable). Annual goals for supervisees of \$6M outright/life income gifts and \$30M bequest gifts (at least one-half of which are recordable).

Responsibilities

- Oversees and manages five Gift Planning Officers (GPOs) who are responsible for the identification, cultivation and solicitation of giftplanning donors and prospects. Provide guidance and direction on working with donors and prospects and recommends solicitation strategies to campus unit fundraisers at multiple levels.
- The Deputy Director position ensures that the gift dollar goals as established at each fundraiser specialization level among the five GPOs are met annually. The fundraiser specialization levels are Fundraiser 4 (FR4) and Fundraiser 5 (FR5). Among the five GPOs there are two FR4s and three FR5s.
- The two FR4s are each expected to raise \$5M in bequests and \$1M in outright and life income gifts annually. The three FR5s are each expected to raise \$10M in bequest gifts and \$2M in outright and life income gifts annually.
- The collective work of the Office of Gift Planning with key campus stakeholders yields complex

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gifts, typically exceeding \$100M per year.

- Manages the OGP team's fundraising programs via the collective strategy of OGP fundraising staff to successfully meet the predetermined goals and objectives, ensuring that OGP unit fundraising goals are met.
- May manage other external relations functions, such as volunteers, support groups, giving societies, outreach, etc.
- Selects, trains, guides and directs staff, and as required, takes corrective action.
- Maintains and expands gift planning expert knowledge base and management through regular professional training attendance and participation in professional conferences and activities.

Required Qualifications

- Minimum 5 years of experience demonstrating expert knowledge of all aspects of gift planning fundraising, specifically including complex planned gifts ranging from bequests to charitable remainder trusts to donor designated funds to gifts from retirement plan vehicles.
- Minimum 5 years of experience demonstrating expert skill in making persuasive and compelling presentations of campus goals/objectives and in securing gifts as evidenced by closing life income gifts, outright gifts and bequest gifts.
- Minimum 5 years of experience demonstrating expert knowledge of the law, rules, regulations and policies regarding charitable aspects of tax, estate planning and probate law.
- Minimum 5 years of experience demonstrating knowledge and understanding of investment and financial matters, including complex assets and business transactions.
- Minimum 5 years of experience demonstrating expert knowledge of gift planning, preferably in a major non-profit institutional environment.
- Strong knowledge of all aspects of fundraising, donor and public relations, including strategies for donor identification, cultivation and solicitation, specifically handling persuasion / negotiation and strong marketing skills.
- Strong knowledge of the campus, its achievements, vision, mission, goals, objectives, applicable policies, infrastructure, and current issues of concern.
- Strong management / leadership skills, concepts, principles and best practices to select, train, mentor, evaluate and motivate staff.
- Strong written, oral and interpersonal communications skills and political acumen to establish and maintain good working relationships within all organizational levels and with outside constituencies.
- Strong skills to meet predetermined goals and objectives, including securing gifts and meeting fundraising goals.
- Strong strategic planning skills and skills to conceive, design, implement, evaluate and manage



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fundraising programs and strategies.

- Strong analytical, critical thinking, problem-solving skills.

Education Level

Bachelor's degree in related area and / or equivalent experience / training

Preferred Qualifications

JD, Graduate Degree or Master's Degree or Paralegal Certificate or related education.

Salary & Benefits

This is an exempt, monthly paid position, eligible for UC benefits. For information on the comprehensive benefits package offered by the University, please visit the University of California's Compensation & Benefits website. For information on the comprehensive benefits package offered by the University, please visit the University of California's Compensation & Benefits website.

Under California law, the University of California, Berkeley is required to provide a reasonable estimate of the compensation range for this role and should not offer a salary outside of the range posted in this job announcement. This range takes into account the wide range of factors that are considered in making compensation decisions including but not limited to experience, skills, knowledge, abilities, education, licensure and certifications, analysis of internal equity, and other business and organizational needs. It is not typical for an individual to be offered a salary at or near the top of the range for a position. Salary offers are determined based on final candidate qualifications and experience.

The budgeted salary or hourly range that the University reasonably expects to pay for this position is \$180,000 to \$210,000, commensurate with experience.

How to Apply

To apply, please submit your resume and cover letter.

Diversity Statement

Please include, as part of your application a brief (1-2 paragraph) statement on your contributions to diversity, equity, inclusion, and belonging in your professional experience.

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Advancing diversity, equity, and inclusion are fundamental to our UC Berkeley Principles of Community, which states that "every member of the UC Berkeley community has a role in sustaining a safe, caring, and humane environment in which these values can thrive."

Other Information

- This is a hybrid position with 50% remote work eligibility.
- This is a Bay Area/Northern CA-based position.
- This is not a Visa opportunity.

Other Information

The minimum posting duration of this position is 14 calendar days. The department will not initiate the application review process prior to July 10, 2024

Conviction History Background

This is a designated position requiring fingerprinting and a background check due to the nature of the job responsibilities. Berkeley does hire people with conviction histories and reviews information received in the context of the job responsibilities. The University reserves the right to make employment contingent upon successful completion of the background check.

Equal Employment Opportunity

The University of California is an Equal Opportunity/Affirmative Action Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, or protected veteran status. For more information about your rights as an applicant, please see the U.S. Equal Employment Opportunity Commission poster.

To Apply, visit:

https://careerspub.universityofcalifornia.edu/psp/ucb/EMPLOYEE/HRMS/c/HRS_HRAM_FL.HRS.CG_SEARCH

Contact Information



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Please reference Academickeys in your cover letter when
applying for or inquiring about this job announcement.

Contact

N/A

University of California, Berkeley

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