

Assistant Director, Fund Policy (7399U), University  
Development and Alumni Relations - 72945  
University of California, Berkeley

Direct Link: <https://www.AcademicKeys.com/r?job=244988>

Downloaded On: Sep. 26, 2024 11:38pm

Posted Sep. 17, 2024, set to expire Jan. 15, 2025

<b>Job Title</b>	Assistant Director, Fund Policy (7399U), University Development and Alumni Relations - 72945
<b>Department</b>	
<b>Institution</b>	University of California, Berkeley Berkeley, California
<b>Date Posted</b>	Sep. 17, 2024
<b>Application Deadline</b>	Open until filled
<b>Position Start Date</b>	Available immediately
<b>Job Categories</b>	Associate/Assistant Director
<b>Academic Field(s)</b>	Development/Institutional Advancement Alumni Relations
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**Job Description**

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**Assistant Director, Fund Policy (7399U), University Development and Alumni Relations - 72945**

**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.

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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](http://grow.berkeley.edu).

### **Departmental Overview**

#### **University Development and Alumni Relations (UDAR)**

University Development and Alumni Relations (UDAR) builds Berkeley's excellence and character by strengthening relations with alumni, parents, and friends of the University, raising public awareness about Berkeley, and increasing private philanthropy. UDAR provides overall direction for the campus's alumni relations and fundraising strategies and works to strengthen unit development offices by partnering with campus advancement professionals. It handles a range of central activities and services, encompassing events, communications, stewardship, prospect development, gift management, database management, and more.

#### **Advancement Operations Overview**

Advancement Operations develops and delivers the centralized business systems and services that

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support the work of UC Berkeley's 30 decentralized fundraising units-helping them collaborate and communicate in order to maximize their collective results. Advancement Operations also provides governance through its role as the official source of alumni and fundraising data.

### **Fund Stewardship and Compliance (FSC) Unit**

Fund Stewardship and Compliance (FSC), within UDAR's Advancement Operations division, enables the creation, maintenance, and stewardship of Berkeley's 11,000+ gift funds. The Fund Stewardship & Compliance team ensures the careful management of gifts to the campus by balancing donor needs with risk management. They maintain and report on gift funds to safeguard the university's financial health and provide educational resources on endowments. Additionally, the team communicates the impact of endowment giving through stewardship reports that inform and inspire donors.

### **Position Summary**

The University of California, Berkeley raised \$1.31 billion in gifts in FY 23-24. Many of these gifts created new programs and initiatives for the campus. Fund Stewardship & Compliance team, part of Advancement Operations in University Development and Alumni Relations, is charged with writing, negotiating and otherwise approving agreements for gifts including: those that establish new programs/funds; payments over multiple years; or are complex in nature. Each year FSC handles over 1,000 such agreements, totalling an average of \$650 million in new support to benefit the campus. Approving a gift agreement requires advanced knowledge of campus and UC systemwide policies; gift acceptance concepts: federal and state provisions (such as the Uniform Prudent Management of Funds Act and IRS guidelines); and other campus policies and procedures.

The position of the **Assistant Director, Fund Policy** is responsible for executing the intake systems, organization, and review and acceptance of much of this portfolio of agreements. The position serves as a campus expert on gift and related policy in order to advise campus constituents on appropriate outcomes. The position ensures that the campus will be able to execute gifts according to donor intent.

This position involves analytical studies on a variety of policies, projects, programs and issues in support of campus gift policy and acceptance through University Development and Alumni Relations. Assists in gift policy and program planning, development and administration; interprets, monitors and analyzes information regarding gift policies and procedures and provides consultative services regarding gift policy to fundraisers and other campus constituencies who are raising gift revenue.

### **Application Review Date**

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The First Review Date for this job is: September 28, 2024

## Responsibilities

### Gift Agreements and Policy Compliance

- Ensures campus compliance as it relates to gift agreements with legal and regulatory requirements in a complex changing environment. This includes writing and approving agreements for new gifts that may establish new funds and/or new campus programs, as well as negotiating outside agreements from various funders.
- Serves as a campus point of contact on policy issues relating to gifts, including but not limited to endowments; intellectual property; gift acceptance; research gifts; Proposition 209.

### Specialized Programs Advisory

- Provides guidance, education, policy interpretation to the campus within the research gift and corporate gift sponsorship domain, and represents the campus to external agencies - such as corporate and institutional funders.

### Gift and Fund Policy Analyses and Implementation

- Analyzes, predicts and advises constituencies regarding direction in the absence of clear external and internal practices. These constituencies include fundraisers, research administrators, faculty, department managers and center directors.
- Helps to advance new gift policies, guidelines and procedures for implementation on the campus. Helps plan, develop, and implement new programs required to implement new policy.
- Develops proposals and recommendations to guide and support a broader strategic direction for the function, research initiative, program and / or organizational unit.

### Organizational Development

- Participates with high level management in strategic thinking and planning in policy domain. Develops proposals and recommendations to guide and support a broader strategic direction for the organization.
- Identifies gift policy issues of importance to the Campus which frequently cross organizational lines and require research of state and national organizations; develops appropriate analytical

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and procedural framework for addressing the issues on the Campus. Including benchmarking practices at comparable institutions.

- Ensures operational excellence through management and improvement of data systems and related software programs.

### Required Qualifications

- Minimum three years of experience providing guidance or consultative services to professional or academic staff, or clients.
- Advanced knowledge of common organizational- or research-specific and other computer application programs.
- Strong communication and interpersonal skills to communicate effectively with all levels of staff and influence, both verbally and in writing.
- Ability to use discretion and maintain all confidentiality.
- Advanced project management skills.
- Thorough knowledge of organizational or initiative processes, protocols and procedures, especially as it relates to policy and compliance.
- Ability to multi-task with demanding timeframes.
- Advanced knowledge of applicable policy analysis techniques.
- Advanced analytical / problem-solving skills.

### Education Level

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

### Preferred Qualifications

- Minimum three years of experience providing guidance or consultative services in research, fundraising, or similar settings.

### 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.

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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 \$95,000 - \$115,000, commensurate with experience.

### **How to Apply**

To apply, please submit your resume and cover letter.

### **Other Information**

- This is a hybrid position with up to 100% remote work eligibility.
- This is not a Visa opportunity.

### **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.

The [University of California's Affirmative action policy](#).



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The [University of California's Anti-Discrimination policy](#).

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**To apply, visit**

[https://careerspub.universityofcalifornia.edu/psc/ucb/EMPLOYEE/HRMS/c/HRS\\_HRAM\\_FL.HRS.CG\\_S](https://careerspub.universityofcalifornia.edu/psc/ucb/EMPLOYEE/HRMS/c/HRS_HRAM_FL.HRS.CG_S)

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### Contact Information

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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