

Associate Director, Planned Giving (Title under review)
VER University Development - Major Gifts & Planned Giving
Competition No.: A100147666
Closing Date: May 02, 2022

While this position welcomes applications from the public, please note that preference will be given to current employees at the University of Alberta. Please indicate your internal status using the "Advertisement" drop down menu when applying.

Ideas. Talent. Purpose.

At the University of Alberta, we begin with people - people with ideas, talent, and purpose.

Every generation is called upon to build a university poised to tackle the challenges of today and tomorrow. The University of Alberta meets those challenges grounded by our roots — yet spurred forward by our profound responsibility to seek truth, solve problems and shape a future unhampered by fixed tradition.

We seek out challenges so we can create change. We question and test the status quo and then innovate on it. We collaborate and integrate. We overcome barriers so our ideas can collide and grow.

And, together, we create new purpose.

A career in Development at the University of Alberta positions you as a key player in creating this future. Bring your passion for relationship building and your belief in the power of philanthropy to the University of Alberta, and help deepen our dedication to excellence and extend our record of public leadership by playing a lead role in building a better province, a better Canada, and a better world.

Position Summary

Reporting to the Manager, Major Gifts & Planned Giving within Development, the Associate Director, Planned Giving is responsible for managing the planned giving activities of the Office of Major Gifts & Planned Giving. Both the Manager and the Associate Director interact extensively with front-line fundraising colleagues across Development as well as with senior university leadership.

A planned gift is often referred to as the “ultimate gift” because it is a gift that is realized through an individual donor’s estate or through other deferred giving instruments. While these gifts are deferred, they play a critical role in helping the University of Alberta secure donations that are transformational in nature, which most often include an estate planning component.

Responsibilities include: planned giving fundraising from a defined portfolio of individual planned giving prospects, maintaining and using a comprehensive knowledge of gift

planning strategies and vehicles, along with an understanding of tax and trust laws applicable to the basic estate planning fundamentals, strategic planning for Planned Giving fundraising, and communication and coordination with other Development portfolios.

The Associate Director, Planned Giving helps establish specific goals and develops long term philanthropic relationships with planned giving prospects and donors. He/she solicits planned gifts in face-to-face meetings, by telephone, video call, and correspondence and coordinates strategic moves to help Development reach its overall financial goals. The Associate Director works independently and collaboratively as a team member in Development and with colleagues throughout the faculties and administration.

Duties

Portfolio Management

- Conducts 150 or more face-to-face visits per year with the goal of closing ten or more planned gifts per year
- Develops effective cultivation and solicitation strategies for planned giving prospects
- Maintains a portfolio with a minimum of 150 planned giving prospects
- Initiates and/or participates in identification, cultivation and solicitation activities, including performing joint calls, with the University's major gift officers and faculty development officers
- Provides timely response to requests from donors and potential donors; follow up and cultivation, solicitation and stewardship as appropriate

Prospect Management

- Ensures that all facets of the prospect management system are up to date, including: timely filing of contact reports in the Advance database, timely communication with all newly assigned prospects, prioritization of all prospects, for example key reunion prospects, timely updating of the planned giving prospect track, for example stage codes, next/last tasks, etc., and completing follow-up correspondence with prospects, donors and University Administrators

Strategic Planning for Planned Gift Fundraising

In collaboration with the appropriate Faculty Development Officers and Annual Giving Officers, creates and implements a planned giving fundraising plan that will maximize the closure of planned gifts

- Focuses on securing endowment support for the University's future

- Plans and ensures delivery of planned giving seminars

Communications and Coordination

- Ensures purposeful team communication and coordination with Faculty development officers and major gift officers within Development
- Proactively and consistently communicates with the Manager, Major Gifts & Planned Giving; Director, University Development; Associate VP, and Senior Management team
- Assists with internal planned giving training of all University front-line fundraisers
- Collaborates in developing planned giving-focused prospect strategy with Development colleagues
- Works consistently and collaboratively within University Prospect Management Policy

Minimum Qualifications

The successful candidate will have a bachelor's degree (advanced degree preferred) and minimum of three years' experience in professional fundraising, with preference given to planned giving experience in a post-secondary environment or similarly complex organization, or five years' progressively responsible professional experience in fields related to the management of personal wealth within long-term relationships (e.g. Certified Financial Planner, licensed attorney with estate planning experience, bank trust officer working in trust administration). The Associate Director, Planned Giving will possess a demonstrable knowledge of tax and trust laws affecting planned giving vehicles/strategies and comprehensive/charitable estate planning.

They will have the ability to understand the needs and interests of the leadership and planned gift prospects and donors, in order to develop relationships between them and the University, and will be able to rapidly become familiar with university-wide priority program areas and establish and maintain effective working relationships on and off campus. The candidate will also possess an appreciation of the mission of a major research university and the ability to creatively match the university's highest priority needs with the interest of alumni and friends.

The Associate Director, Planned Giving must have demonstrated capacity to deal effectively, with poise and confidence, with potentially large benefactors of the University, including direct solicitation. The candidate must be willing and able to travel for work including staffing evening and weekend programs and events.

Location- Work primarily takes place at North Campus, Edmonton.

How to apply

To apply, please click the Apply Online button and attach the following:

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- uity, diversity, and inclusivity philosophy - describe your philosophy, experience, training, future interests and goals

In accordance with the Administrative and Professional Officer Agreement, this full-time continuing position offers a comprehensive benefits package found on our Benefits Overview page and annual salary range of \$75,863-\$126,439.

Interested applicants may apply to: <https://apptrkr.com/2999808>

The University of Alberta is committed to an equitable, diverse, and inclusive workforce. We welcome applications from all qualified persons. We encourage women; First Nations, Métis and Inuit persons; members of visible minority groups; persons with disabilities; persons of any sexual orientation or gender identity and expression; and all those who may contribute to the further diversification of ideas and the University to apply.