

University of Alberta
VER Development & Alumni Rel.
Development Officer, Planned Giving

Competition No. - A114948540
Closing Date - Oct 05, 2022

This position is a part of the Association of the Academic Staff of the University of Alberta (AASUA).

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 \$68,527 - \$114,207.

Location
Work primarily takes place at Enterprise Square.

Working for the University of Alberta

The University of Alberta acknowledges that we are located on Treaty 6 territory, and respects the histories, languages and cultures of First Nations, Métis, Inuit and all First Peoples of Canada, whose presence continues to enrich our vibrant community.

The University of Alberta is teeming with change makers, community builders, and world shapers who lead with purpose each and every day. We are home to more than 40,000 students in 200+ undergraduate and 500+ graduate programs, over 13,000 faculty and staff, 260,000 alumni worldwide and have been recognized as one of Canada's Greenest Employers for over a decade.

Your work will have a meaningful influence on a fascinating cross section of people—from our students and stakeholders, to our renowned researchers and innovators who are quite literally curing diseases, making discoveries and generating solutions that make the world healthier, safer, stronger, and more just.

Working for the Department/Faculty
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. We meet 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.

Here 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

Reporting to the Manager, Major Gifts & Planned Giving, the Development Officer, Planned Giving is responsible for managing the stewardship of Planned Giving donors, the stewardship of Realized Estate gifts, and a portfolio of Planned Giving prospects.

This position will have a direct impact on planned giving fundraising results for the University through meaningful planned gift stewardship, donor engagement and solicitation.

The Development Officer, Planned Giving develops long-term philanthropic relationships with planned giving donors, families of realized estate donors, and a portfolio of donors. The successful candidate will create engaging experiences for planned giving donors and identify meaningful giving opportunities for new donors. This position also has the unique opportunity to build out and oversee the Estate Stewardship Program by working with executors and family members to establish and implement appropriate stewardship plans for realized estate gifts.

Duties

- Stewardship of planned giving donors and estate gifts.
- Practice Planned Giving, Major Gift and Leadership Annual Giving fundraising from a defined portfolio of individual planned giving donors and estate donors.
- Provide a strong understanding of fundraising best practice and principles, especially from a Donor Relations perspective.
- Maintain and use a basic knowledge of gift planning strategies and vehicles, along with an understanding of tax and trust laws applicable to the basic estate planning fundamentals.
- Communicate and coordinate with other Development portfolios as required to ensure that donors have a positive experience with the University of Alberta.

Minimum Qualifications

- Bachelor's degree required.
- Minimum of three years experience in professional fundraising.
- Demonstrable knowledge of basic tax and trust laws affecting planned giving vehicles/strategies and comprehensive/charitable estate planning.

- Proven ability to identify, qualify, cultivate and solicit individual gifts on a face-to-face basis.
- Appreciation of the mission of a major research university and the ability to creatively match the university's highest priority needs with the interests of alumni and friends.
- Self-motivated, proactive, energetic, creative, goal oriented.
- Excellent interpersonal skills; excellent written and oral communication skills.
- Excellent organizational and time management skills; ability to work towards goals within deadlines.
- Problem solving skills.
- Demonstrated ability to be a contributing member of multi-disciplinary teams.
- Well-developed level of computer literacy.
- Willing and able to travel for work including staffing evening and weekend programs and events.

Preferred Qualifications

- Planned giving experience and/or stewardship experience in a post-secondary environment or similarly complex organization.

Interested applicants may apply to:

<https://www.careers.ualberta.ca/Competition/A114948539/>

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.