

Gift Planning Officer (0462U), University Development and
Alumni Relations - 73726
University of California, Berkeley

Direct Link: <https://www.AcademicKeys.com/r?job=247214>

Downloaded On: Oct. 19, 2024 1:14pm

Posted Oct. 17, 2024, set to expire Feb. 13, 2025

Job Title	Gift Planning Officer (0462U), University Development and Alumni Relations - 73726
Department	University Development and Alumni Relations
Institution	University of California, Berkeley Berkeley, California
Date Posted	Oct. 17, 2024
Application Deadline	Open until filled
Position Start Date	Available immediately
Job Categories	Professional Staff
Academic Field(s)	Institutional Advancement Finance/Investment Management
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Job Description

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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.



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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.

Departmental Overview

University Development and Alumni Relations

University Development and Alumni Relations (UDAR) helps build Berkeley's excellence through communications, public outreach, and fundraising 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 fundraisers. It handles a range of central activities and services encompassing prospect development, communications, donor stewardship, gift 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

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commitments, each year the Office partners with colleagues across the campus on more than \$120 million in gifts.

The **Gift Planning Officer**, using advanced gift planning fundraising concepts, cultivates, solicits, and closes estate gifts, outright gifts, and life income gifts. Results have major impact on overall program goals and assignments, and are typically at the "major gifts" level, including managing portfolios of donors capable of creating life income gifts of an average of \$100,000 and bequest commitments in the millions of dollars. May attend functions, meetings and serve on internal/external committees as a campus representative. After ramping up and within two years, position is expected to develop on an annual basis 50 individualized gift proposals and close annually \$1M in outright and life income gifts and \$2M in bequest commitments.

Application Review Date

The First Review Date for this job is: October 30, 2024

Responsibilities

- Writes proposals, using sophisticated specialized software and with an understanding of estate and tax law for solicitation of individual gift planning prospects and donors. For example, using software to demonstrate prospect's/donor's estimated charitable income tax deduction, taxation of payments, life expectancy, non-charitable portion of gift.
- Ensures that predetermined fundraising goals are met. These goals for an Fundraiser 4 are expected to meet or exceed annually: \$1M in outright and/or life income gifts, \$2M bequest commitments and 50 individualized proposals. Goal results have a major impact on the campus-wide gift planning fundraising goals.
- Identifies, cultivates, solicits and stewards gift planning prospects and donors capable of making gifts ranging from an average \$100,000 life income gifts to multimillion-dollar estate gifts.
- Work with assigned campus units (schools, colleges, and other units), averaging 5 -8 units per each Fundraiser 4 to create prospect and donor strategies and proposals. Implement these strategies working collaboratively with the unit based fundraisers.
- May attend functions, meetings and serve on internal/external committees as a representative of the campus and/or UDAR such as the Berkeley Advancement Community Executive Committee, advancement staff search committees, business process improvements in a variety of planned giving functions.
- Special gift planning projects as assigned, including but not limited to serving as the fundraiser partner to our marketing associate director on all prospect and donor communications from our office.

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Required Qualifications

- Minimum three years of experiencing demonstrating advanced knowledge of all aspects of estate planning and gift planning fundraising, donor relations, and public relations concepts, principles, procedures, and techniques.
- Minimum three years experience applying advanced knowledge of applicable laws, rules, regulations, policies, etc to gift planning fundraising.
- Advanced written, oral, and interpersonal communication skills, including political acumen, to establish and maintain good working relationships throughout the organization and with outside constituencies. Ability to make persuasive and compelling presentations of goals and objectives for campus in order to secure gifts.
- Advanced organizational, analytical, and critical thinking skills, including skill in creative and effective decision-making and problem identification / avoidance / resolution, and strong project management skills.
- Very strong skills in maintaining confidentiality surrounding prospects and donors financial, philanthropic and estate planning goals and capacity.

Education Level

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

Preferred Qualifications

- Demonstrate advanced working knowledge of all aspects of a university campus, including current issues of concern for both the campus and/or throughout higher education generally.
- Advanced working knowledge of a university campus vision, mission, goals, objectives, achievements, and infrastructure.
- JD or Paralegal Certificate.

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.

Under California law, the University of California, Berkeley is required to provide a reasonable estimate

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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 that the University reasonably expects to pay for this position is \$124,000 to \$138,000. Candidates with multiple years of relevant experience who meet both the required and preferred qualifications may be considered for the high end of the range.

How to Apply

To apply, please submit your resume and cover letter.

Other Information

- Two (2) positions/FTE's available with this posting.
- 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.

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.



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

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

To apply, visit

https://careerspub.universityofcalifornia.edu/psc/ucb/EMPLOYEE/HRMS/c/HRS_HRAM_FL.HRS.CG_S

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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