

Senior Director of Development – Gift Planning

Houston, TX, United States

JOB DESCRIPTION

Special Instructions to Applicants:

All interested applicants, please attach a cover letter and resume in PDF format.

Position Summary:

Reporting to the Executive Director of Gift Planning, the Senior Director of Development - Gift Planning is responsible for securing planned and complex asset gifts and/or blended gifts; i.e., a combination of annual, outright, revocable and irrevocable deferred gifts. Primary responsibilities include the identification, cultivation, solicitation and stewardship of alumni, parents and friends, with particular attention to those capable of gifts valued at \$250,000 or more. The Senior Director of Development - Gift Planning values collaboration and partners in fundraising activities with a portfolio of school and regional major gift and annual gift officers. This person assists in providing technical expertise to development officers and university administrators. With oversight from the Executive Director of Gift Planning, the Senior Director of Development - Gift Planning participates actively with the rest of the gift planning team in the design and implementation of the gift planning marketing and communications. The Senior Director of Development - Gift Planning mentors, coaches

and participates in formal training of fellow gift planning team members, development professionals and volunteers in blended and planned gift fundraising to further the fundraising and donor engagement goals of the organization.

Ideal Candidate Statement

The ideal candidate is a highly collaborative leader, strategic thinker, and independent entrepreneur with a demonstrated track record of securing planned gift commitments and has a proven ability to refine and actualize fundraising priorities in conjunction with key academic partners and administration.

Workplace Requirements

Must possess (or have the ability to obtain one within 30 days of hire) and maintain a valid Texas driver's license with no more than three moving violations and/or at fault accidents within the past 36 months, and no convictions or deferred dispositions for Driving While Intoxicated (DWI) or Driving Under the Influence (DUI) within the past five years.

Minimum Requirements:

- Bachelor's Degree
 - In lieu of the education requirement, additional related experience, above and beyond what is required, on an equivalent year for year basis may be substituted
- 7+ years' experience of combined planned gift and major gift fundraising, including at least three years of demonstrated success in closing deferred and complex asset planned gifts
 - 7+ years successful experience in the fields of professional financial planning, trust officer, or in the practice of law working with clients in estate and/or tax planning will also be considered

Skills:

- Strong knowledge of all manner of planned gift vehicles and gifts of complex assets
- Strong knowledge of charitable tax laws
- Working knowledge of estate and tax planning
- Ability to develop and initiate new strategies
- Advanced problem solving skills
- Excellent verbal and written communications skills
- Ability to work well under pressure and manage projects simultaneously
- Excellent organizational and time management skills
- Excellent knowledge of Microsoft Office suite
- Excellent data analysis skills
- Ability to work independently and as part of a team to meet expected deadlines and schedules
- Adept at problem solving, creating contingency plans and handling issues when necessary
- Excellent client service orientation
- Ability to lead and motivate others
- Strategic skills to craft and implement fundraising and/or project plans
- Excellent attention to detail and ability to quickly understand and remember details about alumni/donors and projects to which they are assigned
- Excellent interpersonal skills

Preferences:

- J.D or Master's degree
- Successful fundraising experience in a higher education or other complex non-profit institution
- Experience working in a capital campaign
- Experience using Blackbaud CRM or similar alumni/donor database system
- Experience with gift planning software such as PG-Calc

- Experience in a PC/Windows environment using Microsoft Office tools
- Bar admission in a U.S. state; CFA, CFP, CTFA, CFRE, or other advanced financial planning or fundraising certification

Essential Functions:

- Manages a select portfolio of planned, blended and complex asset gift prospects through qualifying visits, cultivation of prospects, prospect solicitations that align with the prospects' passions and financial capacity, securing the commitment and stewarding current donors
- Assists in developing gift planning marketing and communications
- Collaborates with other development officers regarding soliciting, securing and documenting planned gifts
- Participates in writing topical articles for newsletters and making presentations to external audiences consisting of alumni and Rice supporters
- Prepares sample illustrations for all potential gift vehicles and assets, including, but not limited to, life income gifts, gifts of real estate and other non-cash assets, lead trusts, bequest intentions through various vehicles, etc.
- Assists the Executive Director of Gift Planning by participating in policy and procedure construction
- Performs other duties as assigned

Additional Functions

- Local and national travel to visit with prospects and donors (up to 35% of the time)
- Making cold calls to potential prospects
- Occasional weekend and evening events
- Maintains and develops ongoing knowledge of all manner of planned gift vehicles and gifts of complex assets

- Stays current with and continues developing knowledge of all existing and changing charitable tax laws
- Has frequent and ongoing contact with colleagues in the Development and Alumni Relations division, as well as the Treasurer's Office
- Has some contact with the General Counsel's Office, deans, faculty and other university offices
- Has extensive contact with alumni, friends and parents, plus attorneys, financial planners and other affiliated professionals
- Comfortable working in an open office environment

Rice University HR | Benefits:

<https://knowledgecafe.rice.edu/benefits-overview>

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Rice University is an Equal Opportunity Employer committed to diversity at all levels. It considers for employment qualified applicants without regard to race, color, religion, age, sex, sexual orientation, gender identity, national or ethnic origin, genetic information, disability, or protected veteran status.

ABOUT US

Boasting a 300-acre tree-lined campus in Houston, Rice University is ranked among the nation's top 20 universities by U.S. News & World Report. Rice has a 6-to-1 undergraduate student-to-faculty ratio, and a residential college system, which supports students intellectually, emotionally and culturally through social events, intramural sports, student plays, lectures series, courses and student government. Developing close-knit, diverse college communities is a strong campus tradition, which is why Rice is highly ranked for best quality of life and best value among private universities.

APPLY NOW

JOB INFO

Job Identification	3560
Job Category	Staff - Development
Posting Date	04/23/2024, 11:17 AM
Degree Level	Bachelor's Degree
Job Schedule	Full time
Locations	 Cambridge 6100 Main Street, Houston, TX, 77005, US

