



# University of La Verne

## Director of Development, Planned Giving

Located in Southern California, the University of La Verne offers a distinctive and relevant educational experience to a diverse population of students, preparing them for successful careers and a commitment to lifelong learning across the liberal arts and professional programs. The academic units of the not-for-profit university include the College of Arts and Sciences, the College of Business and Public Management, the LaFetra College of Education, and the College of Law. The university offers both undergraduate and graduate programs, including degree programs tailored for working adults. The university's central campus is located 30 miles east of Los Angeles in the historic Old Town section of La Verne, a city with a population of approximately 35,000 at the foothills of the San Gabriel Mountains. The university also has eight regional campuses throughout California and the College of Law campus in Ontario, California. The university is classified as a Carnegie Doctoral Institution with moderate research activity. Core values are reflected throughout all curricular and co-curricular programs, its emphasis on close professor-student interaction, personal support of its students, and its diversity.

The University of La Verne prides itself in being reflective of the diversity of Southern California. Approximately 80 percent of its nearly 8,500 students come from diverse backgrounds and the U.S. Department of Education has designated the university as a Hispanic Serving Institution (HSI). With 80,000 alumni, the university fulfills a critical community function in educating students from underserved populations, many of whom are the first generation in their family to attend college.

### Summary:

Reporting directly to the Associate Vice President for Advancement, the Director of Development for Planned Giving occupies a key fund raising role at the university as the principal driver of the strategy and execution of the university's planned giving program. The Director is responsible for generating \$4M and higher in major outright and revocable commitments. The Director also serves as the public face of the program presenting seminars, engaging professional volunteers, attending events, conducting trainings, and partnering with on and off campus constituents both locally and nationally.

### Responsibilities:

Manage a portfolio of 125 high level major gift and planned gift prospects with the capacity to make gifts of \$250K and above; facilitate meaningful interaction between major/planned gift prospects and the President, Vice President for Advancement, senior administrators, students, faculty and volunteer leadership; cultivating and soliciting the university's highest level major/planned gift prospects; conduct a minimum of 15 personal visits per month resulting in \$4M plus in annual contributions; conduct prospects through the fund raising cycle including discovery, cultivation, solicitation, and stewardship; produce well written, accurate, and timely gift calculations, proposals, cover letters, thank you letters, and briefings in support of the aforementioned; comprehensively track and record activities as they relate to assigned prospects; regularly report activity to the Associate Vice President and Vice President for Advancement. Lead the design and execution of a multi-year planned giving capital campaign strategy; determine annual program goals; direct the marketing coordinator in the formulation and execution of annual marketing and stewardship plans; review copy for planned giving marketing and communication pieces; write quarterly progress reports; conduct weekly planned giving team meetings; propose and administer annual and multi-year program budget. Hire, supervise, and manage the professional development and review process for the other members of the Planned Giving staff including the marketing coordinator, administrative student worker(s), and other staff as needed. Create and conduct planned giving trainings for Advancement staff, with a specific focus on frontline fundraisers. Advise other fundraisers on blended/planned gift strategy and appropriate literature for their prospects. Attend visits and collaborate with

fundraisers in closing blended/planned gifts as necessary. Identify and enlist both local and regional professional partners in the Planned Giving Advisory Council; engage them with the vision and mission of the university; educate them on the benefits of the charitable giving for their clients/our donors; collaborate with them on design and presentation of various educational seminars; partner with them in closing planned gifts for the university.

**Work Schedule:**

Monday thru Friday 8:00 am – 5:00 pm with some evenings and weekends as well as significant domestic travel.

**Minimum Requirements:**

Bachelor's degree; certification or comparable training in planned giving; three years of demonstrated success in securing cash and planned gifts of \$100,000 and higher; three years of demonstrated success in working with prospects and donors through the life cycle of philanthropy in a higher education setting; and comprehensive knowledge and understanding of planned giving vehicles. Familiarity with IRS code and regulations regarding planned gifts.

**To apply for this position please visit <https://laverne.peopleadmin.com/postings/5891>.**

The University is an equal opportunity employer and does not discriminate against for employment or employees on any basis prohibited by state and federal law. Those applicants requiring reasonable accommodation to complete the application process or if you have any questions should contact the Office of Human Resources at (909) 448-4076.

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