The Opportunity

Brandeis University – a distinguished private research university recognized for its academic excellence and leading-edge research – has an exciting opportunity for a Director, Planned Giving.

Located in the suburbs of Boston, a global hub for higher education and innovation, Brandeis is dedicated to first-rate undergraduate education while making groundbreaking discoveries. Established as a nonsectarian university in 1948 by members of the American Jewish community, our visionary founders shared a commitment to social justice and to making the world a better place.

Our founders’ pioneering spirit and intellectual pursuits continue today at Brandeis – from helping to solve a national public health crisis through work at its newly established Opioid Policy Research Collaborative, to the biological discoveries that last year earned two faculty members a Nobel Prize in Physiology or Medicine. We aspire to further such important endeavors and are looking to grow our team with individuals who share our passion and commitment. In preparation for its next ambitious campaign, Institutional Advancement (IA) seeks to strengthen the bonds with the University’s many constituencies. By working together, we will secure the financial resources necessary to continue the legacy of excellence in teaching, research, and scholarship at Brandeis.

Position Summary

The director’s main focus will be to spearhead and oversee Brandeis University’s Planned Giving Program, including designing, managing and implementing all facets of that program. The Director will create and maintain a robust planned giving culture and awareness among the University’s internal constituencies, and toward this end implement a campus outreach and educational program. He/she will serve as the primary planned giving resource and coach for staff at all levels, and train colleagues and lay partners to cultivate and solicit gifts.

Primary Responsibilities and Essential Activities

- Develop and execute strategies to identify, research, cultivate and solicit qualified prospects for planned gifts in collaboration and cooperation with all of IA’s various subunits.
- Develop a formal planned giving pipeline together with related reporting infrastructure and processes.
• Conduct solicitations. Cultivate relationships, obtain referrals and discuss donor interests with attorneys, trust officers, accountants, financial planners and other estate planning professionals regarding gift opportunities for clients.
• Participate with IA staff in connection with a major capital campaign in all fund raising activities, emphasizing both major and planned giving goals and objectives.
• Design and implement a proactive planned giving marketing plan; design and conduct direct mail and advertising campaigns to target planned giving prospects; develop guidelines and promotional materials for use by the Board of Trustees.
• Respond to inquiries and meet with prospects from the University’s various donor constituencies, including alumni, parents of alumni, friends of Brandeis, lay leadership, and their advisors in one-on-one or group settings.
• Work with Donor Relations to properly steward planned giving donors.
• Plan and execute donor and prospect-focused events, including donor and professional seminars and donor recognition events.
• In collaboration with Systems and Data Management and Prospect Research, oversee a comprehensive tracking system for all planned gift donors and prospects and supervise its use in gift solicitation.
• Negotiate terms of planned giving agreements with donors and their advisors, subject to Brandeis protocol and policies.
• Conduct initial review of completed documents to ensure that they comply with Brandeis policy and IRS guidelines, and are otherwise in the University’s best interest.
• Educate and train IA staff on planned giving best practices.
• Keep abreast of and report on all federal and state changes in the law of planned giving, and developments related thereto.

Qualifications

• BA/BS required. Graduate degree in business, finance or related field and/or JD strongly preferred.
• Minimum five years’ progressively responsible professional experience in development and/or planned giving and fundraising and progressively responsible team management.
• In-depth knowledge of planned giving and its complexities (estate planning, tax laws, wills, trusts, etc.). Familiarity with financial planning, financial reports and budgeting is preferred.
• Ability to clearly and simply explain complex planned giving concepts and vehicles to staff, prospects and senior leadership.
• Must be an outstanding representative of Brandeis in the donor and prospect community.
• Excellent writing and public speaking skills.
• Must be a detail-oriented, self-starter with an ability to work independently and manage multiple high-priority projects and priorities simultaneously to meet aggressive timelines and challenging deadlines. The offices of the President and Senior Vice President, Institutional Advancement are fast-paced, high-pressure environments that often extend beyond the typical 9 – 5 work day.
Commitment to Diversity, Equity, and Inclusion

Founded as a model of ethnic and religious pluralism, Brandeis University welcomes students, faculty, and staff of every nationality, religion, and orientation. Social justice is central to the mission of Brandeis, which endeavors to foster a just and inclusive campus culture that embraces the diversity of our larger society. Brandeis embodies the American heritage of cultural diversity, equal access to opportunity and freedom of expression. Learn more at: http://www.brandeis.edu/about/mission.html

Brandeis University is an affirmative action/equal opportunity employer. It is the policy of Brandeis University not to discriminate against any person on account of race, color, ancestry, religious creed, gender, national or ethnic origin, sex, sexual orientation, age, genetic information, disability, veteran status, or any other category protected by federal or state law. The following person has been designated to handle inquiries regarding the nondiscrimination policies: Vice President of Human Resources, Bernstein-Marcus building, 781-736-4464.

Submit Your Candidacy

We welcome your nominations, inquiries and expressions of interest in this position, which may be directed informally via email or telephone to Advancement administration contacts:

Ania Morris
Assistant Director, Advancement Talent Management & Administration
781-736-4004 | armorris@brandeis.edu

Elizabeth Crabtree
Vice President, Advancement Administration & Operations
781-736-4034 | ecrabtree@brandeis.edu

To apply, please visit our career website and submit your cover letter and resume via the Brandeis University Human Resources online portal at https://careers.brandeis.edu/staffjobs/

Please note that you must upload your cover letter and resume as one combined file.

The material presented in this position summary is for informational purposes only. Candidates offered a position at Brandeis University may be subject to an employment reference check and additional background screening satisfactory to Brandeis. This screening may include a criminal background check, drug testing, and motor vehicle records check.