



Utah State
University

Boyden Executive Search Contact

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Position Summary

Utah State University is seeing a highly collaborative, driven, and innovative Senior Director of Gift Planning who will be responsible for creating a planned giving program for the University. Reporting to Jonathan “Jon” Paulding, Associate Vice President, Central Advancement, the Senior Director will manage the Director of Gift Planning and oversee all aspects of gift planning for Utah State University, including developing and executing a marketing strategy for planned giving. The Senior Director will identify planned gift prospects and build a portfolio of planned gift prospects to meet individual, unit, and overarching goals. The Senior Director will build relationships with and inspire the confidence of donors and their legal and financial advisors. The Senior Director will meet with stakeholders to think strategically and creatively through the gift planning process to help USU stakeholders and investors reach their philanthropic goals.

This position collaborates with other development colleagues and works closely with university and foundation leadership. The Senior Director enhances the performance of other fundraisers by helping them develop planned giving and complex gift competencies, providing feedback and perspective on their fundraising approach/methods, coaching them to realize their optimal performance and objectives, and traveling with gift officers to assist donors in achieving their philanthropic goals. The Senior Director will identify planned giving prospects and build a portfolio to help achieve USU advancement’s goals.

The Senior Director of Gift Planning is committed to a culture of excellence, demonstrates advanced fundraising competencies and helps lead USU’s sustained fundraising success and growth.

This position requires extensive public contact with high-level alumni, donors and volunteers. Frequent travel is required.

Core Responsibilities

- Manage the Director of Gift Planning.
- Develop and implement both annual and long-range goals, objectives and strategies to maximize private support through various sources (individuals, alumni, friends, and planned giving vehicles) for Utah State University.
- Implement marketing strategies, activities, and materials that promote planned giving vehicles and communicate effectively the myriad of benefits of planned giving in charitable estate planning.
- Enhance the performance of unit-based fundraisers by helping them develop planned giving and complex gift competencies, providing feedback and perspective on their fundraising

approach/methods, and coaching them to realize their optimal performance and gift acquisition objectives.

- Collaborate with USU leaders and development peers to link donors' passions with USU priorities and ensure a gratifying gift and/or engagement experiences.
- Manage a portfolio of planned giving prospects; appropriately qualify, cultivate, solicit and steward prospects to advance philanthropy at USU.
- Utilize the suite of advancement resources to provide regular individual and team progress reports on gift planning officer and unit performance, and to implement and achieve strategies for success. Complete contacts/proposals in a timely manner.
- Partner with prospect analytics and research, the principal gift workgroup and campaign operations to identify new donor opportunities, analyze team performance, and implement effective practices.
- Develop and conduct planned giving seminars for development staff and well as donors and advisors on the benefits of planned giving, gift planning tools, estate planning tools, and techniques to effectively communicate complex gift conversations.
- Participate with the planned giving advisory board by providing resources and tools to grow USU's planned giving partnerships.
- Other duties as required.

Qualifications

- Bachelor's degree plus a minimum of five years of planned giving experience.
- Understanding of complex planned giving vehicles.
- Knowledge of wealth transfer planning, including wills, trusts and estate and gift tax laws.
- Ability to have complex gift conversations and a track record of closing planned gifts or negotiating contracts.
- Demonstrated experience building successful, productive and collaborative relationships with top university administrators, deans and board members.
- Demonstrated experience staffing dean's councils, advisory boards and committees.
- Excellent written, verbal and interpersonal communication skills, as well as analytical, research and management skills.
- Demonstrated professional maturity, competency, and skilled problem-solving.
- Knowledge of, and commitment, to the use of information technology to support advancement programs.
- Strong interpersonal skills, particularly with donors, volunteers and staff members from diverse backgrounds.
- Commitment to diversity and inclusion.
- Ability to position Deans to maximize their potential as a fundraiser for the College/School.
- A willingness and ability to travel (at least one trip per month); evening and weekend work is required.
- Ability to work effectively with multiple stakeholders (students, alumni, faculty, staff) from diverse backgrounds.

Core Characteristics

- **Speaking:** Strong written and verbal communication and presentation skills.
- **Problem solving:** Analyzes data and evaluates results to inform and select the best solution and solve problems.

- **Monitoring:** Measures performance of self and others; makes improvements and takes appropriate corrective action.
- **Critical Thinker:** Uses logic and reasoning to identify solutions and approaches to problems.
- **Team building:** Works to create a team-based environment.
- **Decision making:** Makes coherent and appropriate decisions in a timely manner

Additional Characteristics

- Able to take initiative
- Maintain confidentiality
- Assume stewardship
- Accountable
- Commitment to ethical behavior
- Honest and trustworthy
- Strong work ethic
- Commitment to the improvement of USU
- Inquisitive
- Detail oriented

Disclaimer

This position description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive list of all duties, responsibilities and qualifications required of employees assigned to the position.

The Division of Advancement is a welcoming office where inclusiveness and teamwork are highly valued. Advancement staff are engaged in the meaningful work of securing private financial resources to fuel Utah State University's mission by creating gratifying gift and engagement experiences for USU's generous and passionate alumni and friends. Comprising the division are the office of the Vice President, the USU Foundation & Board, Advancement Services, the Alumni Association (Alumni Engagement), Gift Planning, Corporations and Foundations, Strategic Communications, the Annual Fund and ACE (Alumni Center for Engagement). Furthermore, the division coordinates all fundraising efforts across campus, including colleges, various programs, extension campuses, and USU Athletics. Through the collaboration of these units, the Division of Advancement is able to achieve significant annual fundraising goals by inspiring stakeholders to invest their time and resources in Utah State University.

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About Boyden

Founded in 1946, Boyden global executive search was the first firm to focus entirely on retained executive search. Others would soon follow, using many of the basic tenets and principles that Sidney Boyden put in place: maintaining a strict code of ethics and standards; establishing a global presence; creating uniform processes; and working with highly experienced business partners. These aspects of Sidney Boyden's vision are still in use today.

Boyden continues to be a leader in the executive search industry. Through the ever-expanding use of cutting-edge technology, while always adhering to strict ethical standards, we remain true to our rich heritage as the founders of retained executive search. We cover the globe with over 70 offices in more than 40 countries, led by resident professionals adept at working in a global economy. We are poised to help our clients find the people who will lead them today and into the future. In addition to retained executive search, Boyden works with clients seeking advice regarding their Boards. We also assist clients with interim management and leadership assessment.

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