Director of Gift Management

Job Description Summary

The Director of Gift Management works with the Senior Director of Gift Management to lead and support two University-wide Development and Alumni Relations (DAR) programs: leading the Gift Agreement review and approval process for pledges of $25,000 and above, and supporting the administration of the University's life income gift program, which includes estates/bequests, charitable gift annuities, charitable remainder trusts, and pooled income funds. The Director manages staff members who coordinate and produce these key business functions.

Job Description

1. Manages the University gift agreement process. Supervises and manages a team of staff who review draft submissions from schools and centers on a daily basis. Establishes goals, sets performance standards, and promotes staff development. Creates and maintains templates for University binding and non-binding gift agreements. Trains front-line fundraisers and administrative staff on the use of gift agreements. Shepherds gift agreements through the University approval process, assisting gift officers with donor questions and issues and occasionally working directly with donors and their professional advisors to better assist schools in closing gifts. Works closely with the Office of General Counsel to ensure gift agreements varying from the templates are properly reviewed as required. Ensures that proposed terms fit within University gift acceptance policies.

2. Manages and leads staff to achieve optimum results by:
- Communicating financial and key performance indicators and results to direct reports
- Establishing priorities and goals for each staff member
- Managing staffing needs and identifying areas for organizational development updates or changes
- Guiding the talent identification and professional development needs, processes, and outcomes within the department in line with the University's diversity and inclusion priorities
- Setting clear performance expectations and holding staff accountable for outcomes through frequent feedback and coaching
- Ensuring open communication among staff, engaging in team building efforts and holding regular staff meetings that embrace and support the group's diversity
- Inspiring and motivating staff to achieve optimum results

3. Supports the centralized estate and trust administration program for the University. Serves as a resource to the estate administration team for review of complex estates and trusts, accountings, receipts and releases, and other issues that may arise. Supports the team in working closely with the Office of Gift Planning to interact with executors, attorneys, and family members. Supports Penn Medicine-related entities (such as Pennsylvania, Presbyterian, Chester County, Lancaster General, and Princeton Medical systems) with similar estate and trust activities.

4. Supports the University's charitable remainder trust, charitable gift annuity, pooled income fund and charitable lead trust administration. Serves as a resource to team members who administer the University's $100 million life income program. Supports the team in working closely with the Offices of Gift Planning and Treasurer and the University's third-party administrator TIAA Kaspick to prepare all contracts related to newly established life income gifts at the University.

5. Manages the University's Donor Advised Fund program and life insurance gift portfolio. Supervises team members who administer the Penn Donor Advised Fund (DAF) accounts and the University's portfolio of gifted life insurance policies, in conjunction with the Office of Gift Planning. Works closely with the Office of General Counsel to ensure proper DAF grant distribution review procedures to comply with IRS provisions, and with the Office of the Treasurer to implement DAF reporting and accounting standards for donors and for University tax documents. Supervises the University's donated life insurance portfolio and works closely with the Office of the Treasurer in all aspects of life insurance policy administration.

6. Supports Executive Director of Gift Planning in review of University gift acceptance guidelines and gift counting guidelines.

Key Relationships:

The Director works closely with the Offices of Gift Planning, General Counsel, and Treasurer on matters related to University gift agreements, estate & trust administration, life income gifts, and policies & procedures. This position coordinates frequently with DAR Central Gifts and Records on matters related to gift administration. The position works collaboratively with Development leadership in all Schools and Centers to shepherd gift agreements through the University approval process.

****Please provide a resume and cover letter in order to be considered for this role. Please upload all documents in the "Resume/CV" section of the application prior to submitting.****

Qualifications:

BA/BS degree and 7-10 years of development and alumni relations, trust & estate, or relevant business experience or equivalent combination of education and experience required. Law degree preferred. Excellent communication skills, both oral and written, and experience in providing leadership to staff members in a team environment. Knowledge of gift planning and/or higher education development & alumni relations preferred. Ability to meet tight deadlines and work independently. Ability to handle multiple projects simultaneously. Demonstrated ability to interact effectively and efficiently with donors, development officers, and members of the legal & advisory communities. Strong planning and organizational skills, particularly those relevant to a prospect management system. Proficiency with Microsoft Word, Excel, and PowerPoint.

Click here to apply for this position.