



Campus	California State University Fullerton
Job Title	Senior Director of Planned Giving
Classification	Administrator II (Management Level)
Division	University Advancement
Salary Range	Anticipated hiring range \$138,000 - \$169,200 annually (Classification range \$60,636 - \$194,652 annually) <b>Comprehensive benefits package included</b>
Appointment Type	At-Will/Full Time
Work Schedule	Monday-Friday; Occasional early morning, evening and/or weekend hours.
Submit Application	<a href="https://careers.pageuppeople.com/873/fl/en-us/job/559071/senior-director-of-planned-giving">https://careers.pageuppeople.com/873/fl/en-us/job/559071/senior-director-of-planned-giving</a>

This is an opportunity to join a collaborative, purpose-driven team and help fuel the next chapter of impact in one of Southern California’s most dynamic communities.

If you’re driven by purpose, energized by collaboration, and inspired by the power of education to transform lives and communities, this is your opportunity to lead meaningful change and make a difference every day.

**About Cal State Fullerton:**

California State University, Fullerton (Cal State Fullerton) is a leading public university committed to student success, academic excellence, and inclusive excellence. The university fosters a collaborative environment that supports teaching, research, and service while promoting innovation and professional growth. Cal State Fullerton is both a Hispanic-Serving Institution and an Asian American and Native American Pacific Islander-Serving Institution, and a recipient of the Seal of Excelencia (2021 and 2024) from Excelencia in Education. Joining Cal State Fullerton means becoming part of a community dedicated to advancing student achievement, career success, and economic mobility.

Standing on 241 acres in the heart of Southern California, Cal State Fullerton was founded in 1957 and has grown to serve more than 43,000 students. As a leading campus of the California State University system, the University serves as both an intellectual and cultural hub for the region and a driving force in workforce and economic development.

We are an emerging national model for student success through innovative, high-impact educational and co-curricular experiences, including faculty-student collaborative research. Equally, we invest in the growth of our staff, faculty, and administrators through orientations, training opportunities, and ongoing professional development.

As a member of the Titan Community, you'll have access to a wide range of campus resources and experiences—including the Grand Central Art Center in Santa Ana, the Arboretum and Botanical Garden, cultural performances at the Clayes Performing Arts Center, Titan Athletics events, the Titan Recreation Center, and our Employee Wellness Program.

**Job Summary:**

Reporting to the Assistant Vice President for College and Program Development, the Senior Director of Planned Giving plays a pivotal role at Cal State Fullerton. Fundraising activities are consistent with the priorities of the Vice President for University Advancement. Responsibilities include identification, cultivation, solicitation, and stewardship of planned giving donors for the university. The Director will manage a portfolio of major and planned giving prospects and will be responsible for conceptualizing, planning, and implementing a growing planned giving fundraising program that generates private support from individuals for campus-wide programs. Provides various reporting and valuation support and works with donors' attorneys, accountants, and other agents, as appropriate, to establish gift agreements and transfer gifts when they mature. This position manages the Ontiveros Legacy Society and related stewardship activity. Works collaboratively with and in support of volunteers, other development and advancement staff, and other university representatives to cultivate and solicit donors for university-wide priorities. Enlists the involvement of faculty, campus executives, and alumni in expanding individual support for the university. Other duties as assigned.

**Job Duties/ Responsibilities:**

**Management of Planned Giving Program**

- Serves as a leader in securing planned gifts and is responsible for planning and implementing planned giving fundraising activities.
- Develops an aggressive planned giving program aimed at securing gifts from alumni and friends of Cal State Fullerton through bequests, estate planning, life insurance programs, stocks, and various forms of trusts.
- Works closely with the Assistant Vice President of College and Program Development in responding to strategic institutional priorities by planning, setting, and monitoring annual goals aimed at supporting those priorities.
- Provides support for Advancement staff members who are active in planned giving fundraising.
- Manages planned giving program and is involved in all aspects of identifying, cultivating, soliciting, and stewarding major gift prospects.
- Develops both short- and long-range operational action plans to strengthen and grow the planned giving program.
- Plans targeted outreach activities for planned giving aimed at increasing the donor pool and cultivating/stewarding existing prospects, including prospect surveys, marketing, and presentations (in-person and electronic) for the campus community and the public at large.

- Manages the development of marketing strategies and promotional materials for planned giving.
- Develops and manages annual budget for planned giving.
- Works frequently and closely with other college/unit directors of development in planning innovative outreach activities aimed at strengthening the donor pool and cultivating/stewarding existing prospects.
- Provides training and technical assistance on matters related to Planned Giving for UA and academic leaders.
- Consults with senior management and develops and implements policies and procedures for functions within planned giving.
- Oversees the acceptance of complex gift vehicles, including property, blended gifts, real estate, business interests, and more.
- Manages updates to the planned giving website.
- Works with outside counsel and advisors to secure and administer planned gifts.
- Participates in regular prospect strategy meetings with Directors of Development to develop comprehensive principal gift strategies.

**Prospect identification, cultivation, solicitation, and Stewardship of university alumni, faculty, emeriti, retired faculty/staff, and friends**

- Develops and implements appropriate and effective prospect cultivation strategies; collaborates with DODs on prospect cultivation and solicitation strategies.
- Cultivates, solicits, and stewards prospects through personal visits and written and oral communications.
- Effectively manages a portfolio of up to 70 assigned prospects (including prospects for Planned Giving and Emeriti).
- Files contact reports as appropriate.
- Secures written document of gift commitments that allow planned gifts to be "booked."
- Solicits and secures gift commitments to meet established goals.
- Develops gift agreements and letters of intent as appropriate.
- Manages the acceptance and disposition of real estate gifts.
- Completes cultivation and solicitation visits with development officers as appropriate.
- Works with donors, attorneys, accountants, and other agents as appropriate in establishing gift agreements in transferring gifts when they mature.
- Manages the Ontiveros Legacy Society and all planned-giving related stewardship activities.
- Manages CSUF Emeriti Organization on behalf of University Advancement. Provides consultation and strategic direction on Emeriti events, Scholarship Fundraising, and Crowdfunding/Day of Giving efforts. Develops a "Giving Menu" and integrates opportunities into the group's landing page, inclusive of the annual ability to fulfill Emeriti dues.
- Provides the gift administrator with documentation for new CRTs, gift annuities, and testamentary commitments.
- Provides gift administrator with present value calculations of all current CRTs and new testamentary commitments at fiscal year-end for audit and other fiscal year-end reporting.

- Provides outreach and educational opportunities to legacy programs, including Patrons of the Library and OLLI.

#### **Administrative Duties and Post Gift Administration**

- Develops, evaluates, and executes marketing strategies through events, mail, online, email, and social media to educate and attract planned giving prospects.
- Manages the gift acceptance process for the receipt, valuation, and sale of outright and estate gifts of tangible personal property (real property, collections, real estate) according to donor intent. This includes identifying, securing, and liaising with vendors for the sale of such gifts as needed.
- Serves as University Advancement staff responsible for formal naming that requires CSU Board of Trustees approval, including developing sample documents and maintaining an archive of CSUF Campus naming that involves CSU Trustee Approval.
- Monitors annual budget allocation designated to the areas of fundraising listed above.
- Provides reports to the Assistant Vice President (AVP) on the status of solicitations, received donations, and planned gifts.
- Provided forecast reports to the AVP for the fundraising responsibilities listed above.
- Provided the AVP with the status of donor cultivation and solicitation.
- Ensures proper stewardship of donors is being performed, including long-term planned giving stewardship.

#### **Essential Qualifications**

Bachelor's degree from an accredited four-year college or university in a related field. A minimum of 5 years of successful major and planned giving experience, with a proven track record of securing gifts of at least \$500,000. Must demonstrate the ability to work effectively with advancement staff in devising, analyzing, modifying, implementing, and evaluating development programs, as well as directing strategies for the cultivation and solicitation of prospective donors. Exceptional written and verbal communication skills are essential, along with a strong understanding of the higher education environment and the ability to collaborate effectively with both internal and external stakeholders. The candidate must be willing to travel and be proficient in the use of general office equipment, Windows-based personal computers, administrative computing systems, Microsoft Office applications, and other relevant software. Additionally, must possess thorough knowledge of legal, tax, and related aspects of planned giving vehicles, as well as demonstrated development experience within higher education.

A Certified Specialist in Planned Giving (CSPG) certificate is required.

A background check (including a criminal records check) must be completed satisfactorily and is required for employment. CSU will make a conditional offer of employment, which may be rescinded if the background check reveals disqualifying information, and/or it is discovered that the candidate knowingly withheld or falsified information. Failure to complete the background check satisfactorily may affect the continued employment of a current CSU employee who was conditionally offered the position.

**Preferred Qualifications**

Experience working as a fundraising officer in higher education. 7-10 years of successful major and planned giving experience.

**Benefits**

- An array of health plans that include prescription drug coverage
- Dental and Vision coverage
- Income protection benefits including life insurance and disability
- Retirement plan through CalPERS
- Tuition waiver for employees and dependents if eligible
- FlexCash (in lieu of health and dental)
- Employee Assistance Programs
- 15 paid holidays

**Special Working Conditions**

Perform duties outdoors in various conditions as events are held both indoors and outdoors. Must be able to work at the annual commencement ceremonies. Travel to off-campus locations for events, programs, meetings and other activities.

**Additional Information**

California State University, Fullerton is committed to fostering an environment where students, staff, administrators, and faculty thrive. We welcome individuals ready to make an impact on student and staff success to apply and become part of the Titan Community. Reasonable accommodations will be provided for qualified applicants with disabilities who self-disclose.

Cal State Fullerton is an equal opportunity employer that prohibits discrimination based on regardless of race, sex, color, ethnicity, national origin, or any other protected status.

As of January 1, 2022, the [CSU Out-of-State Employment Policy](#) prohibits the hiring of employees to perform CSU-related work outside the state of California.

The scope of responsibilities for this position includes the making or participating in the making of decisions that may have a material financial benefit on the incumbent. Therefore, you will be required to file an initial "Conflict of Interest Form 700: Statement of Economic Interests" within thirty (30) days from date of hire and on an annual basis; and complete the CSU sponsored ethics on-line training within thirty (30) days of appointment, and at least once during each consecutive period of two calendar years following the appointment.

The person holding this position is considered a limited mandated reporter under the California Child Abuse and Neglect Reporting Act and must comply with the requirement outlined in CSU Executive Order 1083, revised July 21, 2017.

This position is designated as a Campus Security Authority (CSA) position under the federal Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act. CSAs are responsible for reporting allegations of Clery Act Crimes reported to them or that they witness. CSA training is required.

Applicants will be required to disclose whether they have received a final administrative decision or final judicial decision determining that they have committed sexual harassment within the last 7 years only after a determination is made that they meet the minimum qualifications for the position, and before an offer of employment is extended. Applicants who reach the final stages of the application process must also sign a release form that authorizes the release of information by the applicant's current and/or former employers to the CSU concerning any substantiated allegations of misconduct.

Regular attendance is considered an essential job function; the inability to meet attendance requirements may preclude the employee from retaining employment.

Applicants who apply for a position may be required to successfully complete job-related performance test(s) as part of the selection process.

Online application/resume must be received by electronic submission on the final filing date by 9:00 PM (Pacific Standard Time)/midnight (Eastern Standard Time). Applicants who fail to complete all sections of the online application form will be disqualified from consideration.

California State University, Fullerton is not currently sponsoring any new H-1B petitions for staff, management, or faculty positions.