



**Planned Giving Officer
(Administrator II)**

MB2017-ED2276

This is a benefited, 0.50 FTE position.

[Apply Today! Open until filled. The Priority Screening date is February 19, 2017](#)

PURPOSE:

Under the general direction of the Vice President for University Development the Planned Giving Officer enhances and manages the planned giving program focused on generating and stewarding planned and deferred gifts in support of CSUMB.

ESSENTIAL DUTIES AND RESPONSIBILITIES include, but are not limited to, the following:

- Manages and oversees the CSUMB Legacy Society including the creation and execution of the planned giving newsletter, events, and communications with CSUMB Legacy Society Members. Responsible for promoting marketing awareness and donor identification and cultivation strategies. Acts as the primary contact for CSUMB Legacy Society and planned giving newsletter production.
- Actively participates in the moves management process through prospect identification, cultivation, solicitation, and stewardship. Develops and ensures up-to-date and accurate electronic, website, and hard copy information related to planned and legacy giving.
- Markets, promotes, and increases awareness of planned giving at CSUMB. Secures planned, differed, major outright and or pledged gifts (\$25,000 or more) through written, verbal, and or face to face solicitations.
- As assigned by the Vice President for University Development, works to secure major gifts in support of fund raising priorities. Works in support of key Development events and represents the University in the community. Evaluates and measures progress toward assigned goals.
- Works closely with the University Development team. Works across campus divisions with faculty, staff, and students. Works closely with volunteers, providing direction and information.
- Performs other job-related duties and special projects as assigned.

KNOWLEDGE, SKILLS AND ABILITIES:

Excellent leadership, interpersonal, organization, oral and written communication skills. Knowledge of fundraising techniques, proposal development, prospect identification, prospect research and cultivation, fund solicitation, donor recognition, marketing and event planning.

Demonstrated ability to be a highly energetic, self-starting, creative and entrepreneurial professional. Ability to function in a team-oriented environment; to work independently as required; to communicate effectively, orally and in writing, with a broad range of internal and external constituents; maintain confidential information; navigate sensitive situations; and establish and maintain effective working relationships. Demonstrated integrity, positive attitude, diplomacy, tact. Must be able to work in accordance with CSUMB and University Development policies and procedures.

MINIMUM QUALIFICATIONS:

Bachelor's degree, a J.D. is preferred, **and** a minimum of five years in relevant planned giving and major gift experience. Familiarity with current planned giving vehicles and estate-planning trends and ability to provide basic calculations in response to planned giving inquiries.

PREFERRED QUALIFICATIONS:

Experience using Raiser's Edge and Crescendo preferred. Technical fluency with Microsoft Office Professional Suite, Outlook, Google mail and calendaring programs. **Highly desirable:** Demonstrated understanding of and commitment to CSUMB's [Vision](#).

SPECIAL CONDITIONS OF EMPLOYMENT & POSITION DESIGNATIONS:

- A background check (including a criminal records check) must be completed satisfactorily before any candidate can be offered a position with CSUMB. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current employees who apply for this position.
- The person holding this position is considered a “mandated reporter” under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in [CSU Executive Order 1083](#) as a condition of employment.
- This position will have a duty to report to the Campus Title IX Officer information pertaining to victims of sex discrimination, sexual harassment, sexual misconduct, dating/domestic violence, and stalking as required by [CSU Executive Order 1095](#).
- This position is a *designated position* in the California State University’s [Conflict of Interest Code](#). The successful candidate accepting this position is required to file Conflict of Interest forms subject to the regulations of the [Fair Political Practices Commission](#).
- Must possess and maintain a valid license to drive in the State of California, pass the Defensive Training Class, and be insurable under the University's liability coverage.
- May require evenings and/or weekend work.

WORK ENVIRONMENT:

Office environment with standard equipment and tasks. Position requires working at a computer and desk for extended periods of time. Requires travel between campus offices and off-campus locations.

SALARY:

Commensurate with qualifications and experience. This is a management level position with an attractive benefits package, which includes: a vacation accrual rate of 8 hours per month at the 0.5 FTE; an excellent choice of medical, dental and vision insurance; long term disability coverage; life insurance; and retirement benefits. For further information, please visit: [Management Personnel Plan](#). The University Corporation at CSU Monterey Bay also provides access to affordable campus housing, [Employee Housing](#).

Ready to Apply for this Great Opportunity? If so, please visit: [Planned Giving Officer](#) at <http://csumb.peopleadmin.com/postings/2497>. Also see how we're [Doing What Matters!](#) at <https://csumb.edu/hr/employment-opportunities#learn-more-about-csumb>

APPLICATION PROCEDURE:

For full consideration, submit the required documents **by 5:00 p.m. on the priority screen date listed above**. For assistance or if you require an accommodation, please call **(831) 582-3389**. For computer/online access you may visit the [Tanimura & Antle Family Memorial Library](#) ([map](#)). Please check the links provided for the respective hours.

CSU Monterey Bay is an Affirmative Action/Equal Opportunity Employer. We consider qualified applicants for employment without regard to: Age, Disability, Race or Ethnicity, Gender, Gender Identity or Expression, Nationality, Religion, Sexual Orientation, Genetic Information, Veteran or Military Status.