



JOB DESCRIPTION

DIRECTOR OF PLANNED GIVING
SAMUEL MERRITT UNIVERSITY

OAKLAND, CA

COOK SILVERMAN SEARCH

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Greenbrae, CA 94904

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**Samuel Merritt
University**

ABOUT SAMUEL MERRITT UNIVERSITY

Founded in 1909, Samuel Merritt University has grown from a nursing diploma program into a college and most recently into a comprehensive health sciences university. Today, SMU is home to more than 2,700 students from around the United States and the world. Our students comprise a passionate, committed and active community of aspiring health science professionals who are the future of healthcare in California and beyond.

With an aggressive Strategic Growth Initiative in place, the development of new academic programs underway, and a strong commitment to community service and health equity, SMU is taking a leadership position in health sciences education in California and beyond.

SMU boasts the second largest number of nursing graduates in California and it's the largest provider of physical and occupational therapists, physician assistants, and podiatric physicians in Northern California. The University is proud to reflect the communities it serves by recruiting students with a variety of ethnic, cultural, and economic backgrounds.

At SMU, students receive personalized instruction and gain hands-on clinical experience early in their programs. Early clinical exposure, in our view, is key to training students in the technical skills and sound reasoning needed to provide care and prepare them to transform the experience of care in diverse communities.

Samuel Merritt University was recently recognized by Forbes Magazine as #1 In the country for average starting salary of its graduates, ranking ahead of schools such as MIT and Stanford. SMU was also named the [best college in California for preparing students to land a job](#) by career research website Zippia. And most recently, Samuel Merritt University's College of Nursing was ranked [No. 2 in the country](#) and its Bachelor of Science in Nursing (BSN) program ranked [No. 1 in California](#), according to college rankings website College Factual.

With a dynamic president who just finished her third year and a bold vision and plan for the future, Samuel Merritt University is an institution that enjoys great momentum. Robust enrollment and a strong financial position make Samuel Merritt University a great "sell" for fundraising professionals joining this vibrant and growing Advancement team.

For more information, please visit <https://www.samuelmerritt.edu/>

POSITION OVERVIEW

The Director of Planned Giving (DPG) oversees and implements SMU's planned giving program. The DPG's portfolio will build a marketing program and a planned giving portfolio of up to 100 planned giving donors and prospects, and as a frontline fundraiser will be responsible for cultivation, solicitation, and stewardship for all gift types from this portfolio. The DPG will work closely with the Dean and faculty in the school of Podiatry as well as all other colleges and departments as appropriate,

REPORTING RELATIONSHIPS

Reporting to the Vice President of University Advancement and Communications, the Director of Planned Giving will be responsible for all planned giving activities for Samuel Merritt University.

PRIMARY RESPONSIBILITIES

- Create and implement a planned giving program for the University that aligns with the mission and goals of the advancement department.
- Create and manage a portfolio of 100-120 major and planned giving donors and prospects through all stages of the planned giving gift cycle.
- Collaborate with other members of the advancement team to develop and implement strategies and actions to identify, cultivate, solicit, and provide stewardship to prospects of planned gifts, including preparation and presentation of planned gift illustrations as needed.
- Prepare and provide training and mentorship to all gift officers on planned giving.
- Collaborate with Vice President for University Advancement and board leadership on strategy for planned giving prospects.
- Establish and launch a planned giving council filled with Bay Area estate attorneys, financial/estate planners, etc. and oversee effective meetings throughout season.
- Manage all aspects of planned giving administration including but not limited to:
 - Prepare and provide weekly/monthly analysis and progress reports to leadership,
 - Facilitate the processing of non-cash gifts to ensure appropriate and timing of acknowledgement, recognition, and stewardship.
 - Review gift agreements for planned and blended gifts, and update documents.
 - Manage and reconcile the planned giving program's expense budget and contributions reports.
 - Collaborate with Stewardship Team on customized acknowledgement plans for planned giving donors.
- In collaboration with the advancement communications team: develop and implement marketing strategies focusing on donor communications, donor events, publications, website, articles, and mailings to promote the planned giving program, including the preparation of presentations, proposals, brochures, correspondence, reports, and collateral supporting materials.
- Manage institutional relationship with any marketing consultants, and oversee development of planned giving program newsletters, emails, brochures, postcards etc.
- Follow up on inquiries in response to planned giving efforts from all prospecting channels.
- In collaboration with the events team, create and execute cultivation and stewardship events that to advance relationships with planned giving donors and prospects.
- Remain current on planned giving best practices, including, tax laws that impact charitable giving, personal assets, and estates.
- Represent SMU on one or more of the Planned Giving Roundtables in the Bay Area.
- Perform additional duties as required.

QUALIFICATIONS

- Bachelor's degree and five or more years of experience in fundraising, with a track record of success in planned giving preferably in higher education
- Experience as attorney or CPA, and/or certification in financial planning, estate planning, or planned

- giving is preferred
- Relevant experience outside the nonprofit environment working with high-net-worth Individuals will be considered
- Proficient in PG Calc and other Planned Giving software
- Strong organizational skills
- Regional travel as needed
- Excellent verbal and written skills including the ability to articulate the case for support
- Strong relationship-building skills, able to interface with internal and external constituents including Deans and Faculty
- Creative problem-solving skills and the ability to initiate and collaborate with others, at all levels.
- Demonstrated ability to work interdependently and independently in a collaborative environment is vital
- Experience utilizing fundraising database programs (experience with Raiser's Edge NXT highly preferred) and other basic software (Microsoft Office and Google Suite)
- Dedication to and passion for healthcare, health equity and the mission of Samuel Merritt University

All employees of Samuel Merritt University are fully vaccinated against COVID-19.

SALARY OR SALARY RANGE

The salary range for this position is \$140,000 to \$160,000 plus excellent benefits.

To demonstrate our commitment to equity and equal pay for all, Cook Silverman Search will continue to post salary ranges on all of its job descriptions moving forward. The practice of not posting salaries perpetuates the gender wage gap and discriminates against people of color by causing individuals to negotiate from a disadvantaged starting point.

TO APPLY

To apply for this position, or for additional information on the opportunity, please send a copy of your resume with a cover letter to Victoria Silverman at apply@cooksilverman.com.

All applications and inquiries will receive a response and be kept strictly confidential.

Samuel Merritt University is an Equal Opportunity Employer.

DEI POLICY STATEMENT

Samuel Merritt University's commitment to diversity, equity, and inclusion is expressed through its mission statement, "to educate students to become highly skilled and compassionate healthcare professionals who positively transform the experience of care in diverse communities." In light of the demographics of our local communities and the vital role a diverse healthcare workforce plays in reducing healthcare disparities, the University has identified diversity as a strategic imperative. Diversity is a core strategy embedded in the ongoing work of the institution at all levels