

SEARCH SPECIFICATIONS



SENIOR DIRECTOR FOR GIFT PLANNING

PREPARED BY:



UTA THE OPPORTUNITY

The University of Texas at Arlington (UTA) is seeking an innovative and experienced individual to join their team as the Senior Director for Gift Planning. This is a remarkable opportunity for a driven and collaborative professional to play a pivotal role in developing and implementing a strategic, comprehensive and proactive gift planning program.

As the Senior Director for Gift Planning, this individual will have the chance to maximize philanthropic support from UT Arlington's alumni, parents and friends during a time of change and expansion within the development and alumni relations division. The successful candidate will be responsible for creating strategies that increase charitable contributions through various planned giving vehicles.

Reporting to the Assistant Vice President for Central Development, the Senior Director will serve as the primary gift planning advisor and strategist for UT Arlington. They will work closely with significant donors, playing an important role in guiding their gift decisions while considering their philanthropic and estate planning needs.

Key responsibilities include overseeing marketing efforts to increase awareness of deferred giving opportunities among internal stakeholders at UT Arlington as well as external constituents. The Senior Director will also manage life income gifts, bequest expectancies, realized bequests, gifts in-kind, real estate gifts and other complex assets. Collaboration with colleagues across the enterprise is essential in establishing strong service orientation between the gift planning office and other development divisions.

The ideal candidate possesses significant experience in gift planning with proven leadership skills. They have excellent organizational management abilities along with strategic planning expertise. Strong communication skills are crucial along with negotiation skills when working with high-level donors.

A track record of raising significant gifts within comprehensive campaigns at multi-unit academic institutions is preferred. In-depth knowledge of legal requirements associated with planned gifts is necessary for success in this role. A bachelor's degree is required; however an advanced degree in an appropriate area of specialization would be advantageous.



Join UTA's dynamic team today and seize this exciting opportunity to shape the future of our university while advancing your career in gift planning. As the Senior Director for Gift Planning, you will have the chance to make a significant impact by developing and implementing a strategic, comprehensive and proactive gift planning program.

UTA is committed to maximizing philanthropic support from their esteemed alumni, parents and friends. This is an ideal time to join their team as they navigate through a period of change and expansion within the development and alumni relations division. By creating strategies that increase charitable contributions through various planned giving vehicles, you will play a pivotal role in securing vital resources for the university's growth.

By joining the team at the University of Texas at Arlington, you will not only contribute to the success of our university but also advance your own career in gift planning. You'll have the opportunity to shape the future direction of the institution while working alongside dedicated professionals who share your passion for philanthropy.



ABOUT THE UNIVERSITY OF TEXAS AT ARLINGTON



Empowering Minds, Transforming Futures:

The University of Texas at Arlington (UTA) stands as a beacon of academic excellence and innovation in the heart of Arlington, TX. With a rich history dating back to 1895, UTA has grown into a world-class institution that is committed to empowering minds and transforming futures. Renowned for its diverse range of degree programs, cutting-edge research initiatives and unwavering dedication to student success, UTA offers an exceptional educational experience that prepares students for the challenges and opportunities of the modern world.



Academic Excellence:

At UTA, academic excellence is at the core of everything they do. With over 180 bachelor's, master's and doctoral programs across various disciplines – from engineering and business to nursing and liberal arts – students have access to a comprehensive range of educational pathways tailored to their interests and career aspirations. The university's distinguished faculty members are experts in their fields who foster an engaging learning environment through innovative teaching methods.

Cutting-Edge Research:

UTA is renowned for its groundbreaking research initiatives that push boundaries and drive innovation. The university actively encourages collaboration between faculty members and students in conducting impactful research across diverse fields such as healthcare technologies, sustainable energy solutions, artificial intelligence applications, urban planning strategies, social sciences advancements – just to name a few. Students have unparalleled opportunities to engage in hands-on research experiences that contribute towards solving real-world problems.

State-of-the-Art Facilities:

UTA boasts state-of-the-art facilities designed to enhance the learning experience for its students. From modern classrooms equipped with advanced technology tools to specialized laboratories outfitted with cutting-edge equipment – every aspect has been carefully crafted with student success in mind. The Central Library provides extensive resources both physically and digitally while offering quiet study spaces or collaborative areas for group projects.

Student Support Services:

Recognizing that each student's journey is unique; UTA provides comprehensive support services to ensure their success. Academic advisors guide students in selecting the right courses, mapping out their academic path and making informed decisions about their future. The Career Development Center offers career counseling, job fairs and internship opportunities to help students transition seamlessly into the professional world. Additionally, UTA provides a range of student organizations and extracurricular activities that foster personal growth and create a vibrant campus community.



Community Engagement:

UTA takes pride in its strong connection with the local community. Through partnerships with businesses, government agencies and nonprofit organizations, UTA actively contributes to the economic development and social well-being of Arlington and beyond. Students have access to numerous service-learning opportunities that allow them to apply their knowledge while making a positive impact on society.

The University of Texas at Arlington stands as an institution dedicated to empowering minds and transforming futures through academic excellence, cutting-edge research initiatives, state-of-the-art facilities, comprehensive student support services and active community engagement. With its diverse range of degree programs across various disciplines led by distinguished faculty members – UTA provides an exceptional educational experience that prepares students for success in today's rapidly evolving world. Join UTA's vibrant campus community where innovation meets opportunity – embark on a journey towards limitless possibilities at one of Texas' premier universities!









The University of Texas at Arlington is a comprehensive teaching, research, and public service institution dedicated to the advancement of knowledge through scholarship and creative work.

The University is committed to providing access and ensuring student success, and to a culture of innovation, entrepreneurship and commercialization of discoveries by our community of scholars.

The University promotes lifelong learning through its academic, continuing education and experiential learning programs. The faculty, staff, and student community shares diverse cultural values that foster inclusivity and cultivate mutual respect.

VISION

The University of Texas at Arlington is a pre-eminent urban public research university that inspires bold solutions with global impact through creative scholarship, transformative access and collaborative learning.





Access and Success

Provide a supportive environment where students can flourish as scholars and citizens. Expand access to academic offerings, scholarship opportunities and other vital resources that prepare students to succeed and graduate.

Opportunity and Excellence

Pursue the highest standards of excellence throughout every facet of the University. Provide all qualified students with opportunities to reap the benefits of the tremendous knowledge that exists at UTA.

Inclusiveness and Diversity

Foster an inclusive environment that supports a diverse community of faculty, staff, and students. Encourage the exploration and discovery of the unfamiliar and promote the understanding of all viewpoints.

Mavericks and Innovators

Ensure a culture of innovation, entrepreneurship and creativity that strengthens our Maverick nature. Cultivate an atmosphere that rewards curiosity and challenges conventional thought.

Collegiality and Collaboration

Encourage a spirit of collegiality and camaraderie among all members of the UTA community. Champion partnerships and collaborative efforts that increase the University's impact on society.

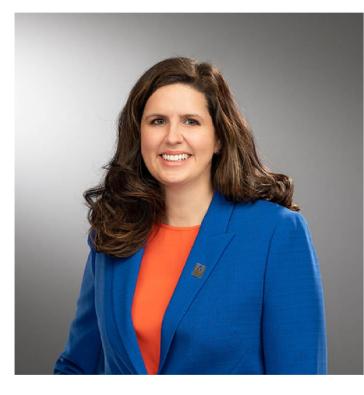


MEET THE PRESIDENT JENNIFER COWLEY, PH.D.

Jennifer Cowley is the first female president of The University of Texas at Arlington and the 10th overall. She is also a professor of public affairs and planning in the College of Architecture, Planning, and Public Affairs.

Dr. Cowley is an advocate for public higher education and passionate about UTA's role in developing the Dallas-Fort Worth economy, society and culture by preparing the next generation of talent.

Cowley has dedicated her career to public service through leadership roles at national research universities, where she championed student success, engaged communities, created strategic collaborations and advanced innovation.



Before joining UT Arlington in 2022, she served as the provost and vice president for academic affairs for five years at the University of North Texas and 16 years at Ohio State University in a variety of capacities, including vice provost for capital planning and regional campuses, associate dean of the College of Engineering, head of city and regional planning, and a professor.

Prior to entering academia, Cowley worked in city government in Amarillo and College Station. She earned a Ph.D. in urban and regional science, master's degree in urban planning and bachelor's degree in political science from Texas A&M University and master's degrees in interdisciplinary studies and public administration from UNT. She is a fellow of the American Institute of Certified Planners and the National Academy of Public Administrators.

An Arlington native, Cowley and her husband, Jon, have a high-school-age son, Nathan.



"UTA IS ALREADY A WORLD-CLASS UNIVERSITY, AND OUR COLLECTIVE FUTURE IS BRIMMING WITH POSSIBILITIES THAT CAN TAKE US TO NEW HEIGHTS."

JENNIFER COWLEY

PRESIDENT

NUMBERS

16

PROGRAMS LISTED ON "BEST GRADUATE SCHOOLS"

> U.S. News & World Report, 2023

#41

ON LIST OF TOP PERFORMERS ON SOCIAL MOBILITY

U.S. News & World Report, 2023 4_{th}

AMONG FOUR-YEAR UNIVERSITIES FOR VETERANS

Military Times, 2022

#56

FOR LEAST AMOUNT OF DEBT AMONG GRADUATES

U.S. News & World Report, 2023 5_{th}

FOR UNDERGRADUATE ETHNIC DIVERSITY

U.S. News & World Report, 2023

MAKING HEADLINES

Local and national media outlets shined a spotlight on UTA's research, academics, and faculty last year.



July 5, 2023

A first look inside Meow Wolf's immersive exhibit opening July 14 at Grapevine Mills

Featuring Art & Art History>

Department faculty art >



June 20, 2022

Ten weeks after escaping Kabul, a women's rights activist found herself in Texas without food, money, and three of her kids

Featuring Roshan Mashal (Gender, Women, & Sexuality Studies) >



June 16, 2023

The I-95 Collapse is a Tragic Reminder That U.S. Bridges are Still Built Without Fire Safety in Mind

> Spotlighting Nur Yazdani's research (Civil Engineering) >

READ MORE: HTTPS://ANNUALREPORT.UTA.EDU



A UNIVERSITY OF DISTINCTION

Our highly ranked academic programs attract the best and brightest scholars from around the world and our faculty and students consistently receive national and international recognition.

EXCELLENCE IN DIVERSITY AWARD

UTA was one of 108 recipients of the 2023 Higher Education Excellence in Diversity Award from INSIGHT Into Diversity magazine, the oldest and largest diversity-focused publication in higher education. This marks the third time UTA has received the HEED Award.



USNEWR BEST COLLEGES

U.S. News & World Report's 2024 "Best Colleges" list includes UT Arlington at No. 129 among public universities.

8,000

FACULTY AND STAFF

UTA is one of the areas largest employers.

FORTUNE 500

LEADERSHIP POSITIONS

Alumni hold leadership positions at all 22 N Texas F500.

\$22.7 **BILLION**

ECONOMIC IMPACT

created by UTA and its alumni in the North Texas region.

FAST FACTS -

HISPANIC-SERVING INSTITUTION

UTA is proud to be designated as a Hispanic-Serving Institution by the Department of Education.

FAST FACTS -

SCHOOL OF SOCIAL WORK/COLLEGE OF NURSING AND HEALTH **INNOVATION SMART** HOSPITAL BUILDING

In 2023, UTA opened the School of Social Work/College of Nursing and Health Innovation Smart Hospital Building, a new facility that unites the University's celebrated School of Social Work (SSW) under one roof, and houses the College of Nursing and Health Innovation's (CONHI) modernized Smart Hospital, a training space that includes mock patient rooms and medical robots. Learn more here.

FAST FACTS -

TOP GRADUATE PROGRAMS

UTA has 16 graduate programs ranked in the top 100 in the nation by U.S. News & World Report, 2022-23.

FAST FACTS -

ENROLLMENT FOR FALL 2022

27,704 Undergraduate 1,662 Postbaccalaureate 11,624 Graduate 40,990 Total

FAST FACTS -

DIVERSITY FALL 2022

13% African American 12% Asian 32% Hispanic 15% International 24% White

ABOUT THE OFFICE OF DEVELOPMENT & ALUMNI RELATIONS

Welcome to the vibrant world of the University of Texas at Arlington's Development and Alumni Relations Office, where they are dedicated to forging meaningful connections and creating extraordinary opportunities. The team thrives on bringing together alumni, donors and friends through captivating events, exclusive networking opportunities and compelling communications.

The office believes in the power of philanthropy to transform lives and takes pride in facilitating a wide range of gifts and pledges that make a lasting impact - from annual giving that fuels immediate needs to endowments and estate planning that leave a legacy for generations to come.

The goals extend beyond fundraising; we are committed to supporting the Maverick community as well as fulfilling our donors' philanthropic interests. By aligning their passions with UTA's mission, they create partnerships that drive innovation, foster academic excellence and empower students to reach their full potential.



and fellowships and more.

UTA LEADERSHIP BIOS



Marie Schultz Vice President

Marie Schultz joined the University of Texas at Arlington as Vice President for Development and Alumni Relations in November 2022. As the head of UTA's fundraising and alumni engagement efforts, she oversees a team of 55 staff members and leads efforts to engage and grow connections with alumni, donors and key institutional stakeholders while building and deepening relationships with corporate and industry partners.

Marie brings 27 years of experience in development to her role and previously served her alma mater, the University of California, Riverside holding various positions within the development office, including Executive Vice President of the University of California, Riverside Foundation and Associate Vice Chancellor for Development.

During her tenure at UC Riverside, Marie helped lead and close the university's first ever comprehensive campaign exceeding the \$300 million campaign goal by \$12 million. Under her leadership, UC Riverside experienced its two highest fundraising years with private philanthropic support surpassing \$42 million in 2021-22.

Marie's expertise lies in campaign fundraising, board development and alumni engagement. Holding an MBA with a concentration in information technology from the University of Redlands and a bachelor's degree in environmental science from UC Riverside, Marie is well-positioned to lead UTA's efforts to expand and grow philanthropic resources.

Jacob W. Singletary, MBA began his career in higher education philanthropy as a student caller in Baylor's Annual Giving Call Center. He would later serve as the Call Center Coordinator and then as the Assistant Director of Annual Giving at Baylor University, overseeing annual marketing campaigns and donor relationships.

In July 2014, Jacob assumed the role of Director of Development for Baylor University's School of Engineering and Computer Science, making the switch from annual giving to major gifts, and playing a crucial role in multiple high stakes campaigns.

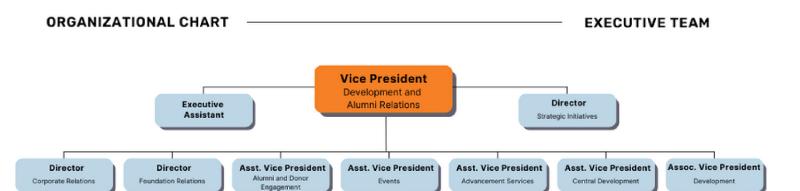


Jacob Singletary Assistant Vice President

In 2016, Jacob took on the role of Director of Development at the University of Texas at Arlington. Jacob's tenure at the university has been marked by his ability to enhance donor engagement, provide stewardship and secure financial and volunteer support for the academic units under his purview. Jacob's success in this role resulted in a promotion to Senior Director of Development.

Recently, Jacob was promoted to the position of Assistant Vice President for Central Development at UTA. In this role, he oversees Annual Giving, Athletics Development, Planned Giving and Regional Major Gifts; he also serves on the Development and Alumni Relations leadership team. His extensive experience in fundraising and his success in his previous positions make him well-suited for this leadership role.





Assistant Vice President Central Development **Associate Director Senior Director Senior Director** Director Annual Giving Athletics Regional Development Gift Planning Programming **Assistant Director Assistant Director** Director Donor Experience Officer Maverick Club Regional Development **Assistant Director Associate Director** Regional Development Donor Experience Officer

CENTRAL DEVELOPMENT

ORGANIZATIONAL CHART



YOUR IMPACT, OUR FUTURE

Through estate planning, you can establish your legacy at the University of Texas at Arlington and influence the university's future. Your service in this role will provide vital support for our students, faculty and institutional goals.

ABOUT THE LEGACY LEADERS OF THE EDWARD E. RANKIN SOCIETY

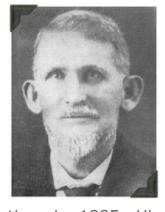
Established in 2010, the Legacy Leaders of the Edward E. Rankin Society recognizes alumni, friends, retirees, staff and faculty who have established an estate gift for the benefit of UTA or a college, school, department or program. These contributions may be made through wills, trusts, annuities, life insurance policies and retirement plans.

The society is named for the business and civic leader who was the driving force behind Arlington College, from which UTA traces its beginnings. Edward E. Rankin was the first in a long line of leaders who shaped the University's future. Donors who have established estate gifts are continuing that legacy.

EDWARD EMMETT RANKIN 3/10/1885 - 4/10/1885

In 1872, Edward Emmett (EE) Rankin and Edna Broiles Rankin were encouraged to move to Arlington by Dr. Willie Stokely Broiles.

Eventually Mr. Rankin joined Mr. Randall in the operation of a hardware store located in the 100 block of East Main. Mr. Rankin continued the operation of the store until the middepression when bankruptcy caused its closure.



EE Rankin served as mayor of Arlington for a very short time in 1885. His descendents of E.E. Rankin included Edward II, Edward III and Edward IV.



SENIOR DIRECTOR FOR GIFT PLANNING

POSITION OVERVIEW:

Reporting to the Assistant Vice President for Central Development, the Senior Director for gift planning will work closely with senior development staff in setting priorities and devising strategies for university-wide gift planning activities. She or he will build strong working relationships with senior academic leadership, key volunteers, faculty and staff to coordinate and collaborate on planned giving opportunities.

The Senior Director will be charged with assessing the university's current approach to its gift planning fundraising efforts and implement a multi-year plan that will raise deferred charitable giving to new levels of achievement. The senior director will work with individual donors regarding their estate planning needs and respond to specific questions in the areas of philanthropic planning, family foundations and wealth transfer, among others. It is expected that the senior director will make important contributions to the strategic direction of the university's largest solicitations.

MAJOR FUNCTIONS AND RESPONSIBILITIES:

- Collaborate with the Assistant Vice President for Central Development in setting the overall strategic direction for the gift planning operation within the context of the development and alumni relations program to strengthen current planned giving fundraising, and contribute to the broader agenda for the university's fundraising efforts in preparation for the next capital campaign.
- Lead a strategic assessment of the university's gift planning operation including the program's infrastructure, resources and capabilities, instituting change as necessary in order to increase capacity and effectiveness.
- Personally manage a portfolio of planned giving prospects and donors, and ensure that timely steps are taken toward solicitation.



- Strengthen donors' awareness of, and interest in, planned giving opportunities, building cultivation, stewardship and solicitation efforts that achieve measurable success.
- Partner with university development officers, faculty members, university officers, and trustees in the cultivation and solicitation of individual donors.
- Establish planned giving as a core competency in the development office and throughout the university; increase the role of planned giving in supporting the university's long-term goals and aspirations.
- Guide the development and alumni relations office's efforts to ensure that all fundraising staff are trained to identify appropriate opportunities to discuss planned giving issues with donors and to identify donors who may benefit from further discussion with the senior director.
- Provide the highest level of gift planning services to internal and external constituents. Work closely and effectively with colleagues in the development and alumni relations office and across the university. Ensure that gift planning is seen as a collaborative, responsive partner able to professionally address opportunities and concerns across the university.
- Serve as a resource to those alumni, parents and friends who may be in need of counsel regarding their estate planning needs, particularly as they consider questions of generational wealth transfer and their family's broad philanthropic priorities. Consult donors and their advisors to ensure that gift purposes are in alignment with university goals and priorities.
- Work closely with key volunteers and alumni leaders to develop a comprehensive plan for the university's planned giving volunteer structure. Manage the planned giving donor recognition society and appropriately leverage and engage volunteer leadership.
- Create and manage gift planning marketing strategies and materials, including newsletters, targeted mailings, website, reunion activities and events.
- Enhance operational efficiency. Ensure that all systems and processes—from gift documentation to systems reporting—are accurate.
- Maintain current knowledge of both traditional and innovative gift planning methods and tax considerations of such gifts. The senior director will possess consummate knowledge of tax and legal aspects of charitable giving.
- Benchmark the university's gift planning program and performance against best-in-class examples at peer and aspirant institutions. Use findings to create and encourage opportunities for organizational and professional growth.



PERSONAL CHARACTERISTICS AND PROFESSIONAL EXPERIENCE:

- A deep appreciation for and an ability to successfully articulate the educational mission and aspirations of UTA.
- At least seven years of development experience in building the infrastructure of a gift planning program in higher education, formulating and executing effective planned giving strategies and a track record of growing contributions through planned giving vehicles. Proven skills as a strategist with the ability to both develop and implement a division's strategic direction.
- Proven experience and a successful track record in the cultivation, solicitation and stewardship of donors at the highest levels, including responsibility for managing a personal portfolio of major and planned gift donors and prospects.
- The credibility, maturity and sound judgment required to effectively engage and leverage university leadership and volunteers in the cultivation, solicitation and stewardship of key prospects and donors, and the desire and ability to work collaboratively with administration and faculty partners.
- Ability to articulate technical planned giving concepts with credibility and authority and to clearly and compellingly convey those concepts to a variety of audiences.
- Sophisticated knowledge of tax and legal aspects of charitable gift planning.
- Strong knowledge of marketing principles and demonstrated success in the use of promotional and educational tools and techniques to build understanding of, and interest in, planned giving.
- Superior communication skills; the ability to understand and translate information for all audiences; clarity, crispness and effectiveness in written and oral presentation. Impeccable attention to detail and follow through; excellent organizational skills.
- Computer proficiency required. Proficiency in gift planning software and illustration preparation preferred. An understanding of and appreciation for the use of technology in building an extended university community.
- A keen eye for operational efficiency and optimal use of resources; the ability to plan, monitor and manage a budget.
- Ability to maintain confidentiality and to exhibit good judgment in making decisions concurrent with university policy.
- Willingness and ability to travel, as well as to work evenings and weekends as required.
- Bachelor's degree required; advanced degree preferred.

Welcome to Arlington, TX – a city that effortlessly combines the best of urban living with suburban charm. Whether you're considering a job opportunity or simply looking for a new place to call home, Arlington has something for everyone. From its vibrant city life and world-class sports venues to its thriving arts and culture scene, outdoor recreational opportunities, and friendly community spirit – this city is an absolute gem waiting to be explored.



Vibrant City Life

The city offers an exciting blend of amenities and suburban urban tranquility. You'll find vourself immersed in a dynamic atmosphere where there's always something happening. From lively street festivals and concerts to bustling shopping and trendy restaurants, Arlington ensures that you never have a dull moment.

Sports and Entertainment Hub

Sports enthusiasts rejoice! Arlington proudly hosts major sports teams like the Dallas Cowboys at AT&T Stadium-

an architectural marvel that sets the stage for thrilling NFL games. Catching a Texas Rangers baseball game at Globe Life Field is another unforgettable experience. With these world-class venues right on your doorstep, you can cheer on your favorite teams alongside passionate fans.

Thriving Arts and Culture Scene

Immerse yourself in creativity! Arlington boasts an impressive arts and culture scene that caters to all tastes. The Arlington Museum of Art showcases captivating exhibitions from renowned artists while Theatre Arlington brings captivating performances to life on stage. Levitt Pavilion for Performing Arts hosts free concerts under the stars during summer evenings – perfect for enjoying music from various genres.



Outdoor Recreation Opportunities

Nature lovers will find their haven in Arlington's abundant green spaces! With over 90 parks spread throughout the city, there are endless opportunities for outdoor adventures. Explore scenic trails ideal for hiking or biking, enjoy picnics amidst picturesque surroundings, cast your fishing line in serene lakes, or let your kids run wild on well-maintained playgrounds. Arlington ensures that nature is always within reach.

Shopping and Dining Experiences

Indulge your senses! Arlington offers a shopper's paradise with options to suit every taste and budget. From large shopping malls like The Parks Mall at Arlington to charming local boutiques, you'll find everything you need – from fashion to home decor. And when it comes to dining, the city boasts an impressive array of culinary delights. Savor international cuisines or dive into mouthwatering Texan favorites – there's something for every palate.

Proximity to Major Cities

Arlington's strategic location between Dallas and Fort Worth is a major advantage. Just a short drive away from these bustling metropolises, you can easily access their unique attractions while enjoying the slightly quieter suburban lifestyle that Arlington offers. This proximity allows for endless possibilities when it comes to work opportunities, entertainment options and cultural experiences.

With its vibrant city life, world-class sports venues, thriving arts scene, outdoor recreational opportunities galore, friendly community spirit, proximity to major cities like Dallas and Fort Worth, as well as top-notch education institutions – living in Arlington is an irresistible choice! Come experience the best of both urban excitement and suburban charm in this welcoming Texan gem. Your new adventure awaits in beautiful Arlington!



To be considered for the Senior Director for Gift Planning opportunity at the University of Texas at Arlington, please submit your letter of interest and qualifications for this position in confidence to Brandy. Priority will be given to candidate materials received by February 9, 2024.



Krystal Floyd
Senior Executive Recruiter
BRYANT GROUP



ADVANCING GREAT LEADERSHIP

Irving, Texas 972.803.6134 www.bryantgrp.com