



OPEN POSITION

Date Posted: June 7, 2024

Updated: June 1, 2024
Title: Associate Director of Planned Giving
Staff Group: Stewardship and Development
Reports To: Director of Stewardship and Development
Location: Open*
Grade: 14, full-time
Hours: 35

* Location is open in the continental United States. You should have easy access to a major airport due to the travel requirements of this position.

Purpose

To oversee the Association's legacy giving program by managing the flow of the UUA bequest pipeline, as well as ensuring the smooth running of the life income gift program. Serve as a member of the major gifts team, partnering with gift officers regarding legacy conversations with donors and maintaining a small portfolio of prospects.

To provide ongoing stewardship of Legacy Society members, while also helping to nurture legacy giving more broadly through the development of marketing materials, workshop presentations, or online webinars. Provide stewardship for scholarship and other named funds.

Principal Responsibilities

1. Oversee portfolio of pending estates, working with executors and estate attorneys to ensure their timely distribution, and when needed, consulting with the Treasurer/CFO or legal counsel.
2. Oversee the Charitable Gift Annuity, Pooled Income Fund and Charitable Remainder Trust programs, including the Umbrella Giving component, which allows donors to designate a percentage of the remainder to their UU congregation or related UU entity. Manage relationship with outside plan administrator. Work with UUA Treasurer to ensure that all relevant regulatory compliance requirements are met.

3. Work collaboratively with gift officers and relevant staff in responding to planned giving inquiries and assist in preparing proposals for donors, their families, and their financial advisors.
4. Craft and implement a strategy for marketing of legacy gifts across various communication channels (advertising, direct mail, email marketing), as well as presenting occasional workshops. Monitor performance of outreach methods in driving inquiries and adapt as needed. Ensure promotional materials (e.g., brochures, relevant website content) are kept up to date.
5. Foster and maintain relationships with members of the UUA Legacy Society through regular communication, including personal outreach. Maintain and actively manage a small portfolio of prospects.
6. Supervise the legacy gifts administrator, overseeing the operational functions of the legacy program in maintaining accurate and complete records, and keeping required regulatory filings current.
7. Serve as point person in drafting governing documents related to establishment of named funds and ensuring agreements comply with the UUA's gift acceptance, endowment, and spending policies. Coordinate resources for consultation during solicitation of complex gifts such as charitable remainder trusts, unitrusts, real estate and retained life estates, or hard-to-value assets.
8. Provide multi-generational stewardship for scholarship and other named funds of the UUA, including preparing annual reports to donors, as well as advising the Finance office and relevant program staff to help ensure funds are used in accordance with governing documents.
9. Maintain subject matter expertise by keeping current in understanding of tax-advantaged gifts, such as gift annuities, pooled income funds, charitable remainder trusts, IRA qualified charitable distributions, etc., as well as state and federal regulations pertaining to planned gift vehicles.
10. Demonstrate perseverance while adhering to the highest ethical standards, showing sensitivity to donors' needs, and reflects an optimistic, positive, and professional attitude in all interactions.
11. Perform other duties as requested by supervisor, the Executive Vice President, or the President.

Qualifications

This is a Grade 14 position (expected hiring range \$81,000 - \$99,200 depending on experience). Note that qualifications may be met as a result of lived experience, volunteer work, professional experience, and/or formal or informal training. Requirements include:

- Bachelor's degree plus a minimum of 4 years' experience in gift planning, major gifts, law, finance, or trust services is expected. Knowledge of charitable gift planning, including tax and inheritance law required; experience making gift solicitations helpful.
- The ideal candidate will have demonstrated skills in goal-oriented constituent relations and experience with progressive responsibility in legacy giving and/or managing the flow of legal documentation and financial recordkeeping in legal or financial services.
- In addition, excellent staff management, research and organizational skills, attention to detail and accuracy, and strong oral and written communication skills are necessary.
- Able to work some evenings and weekends, as well as travel up to 15% of the time, including our Boston headquarters as well as to the UUA General Assembly each June. If not based within commuting distance of Boston, candidate must be accessible to a suitable transportation hub.
- High proficiency in the Microsoft Office Suite (Excel, Outlook, PowerPoint, and Word) is required. Experience with donor management software and planned giving tools, such as PG Calc software, as well as wealth screening tools preferred.
- Work or lived experience with communities of color or indigenous peoples is of particular value.
- Eagerness to work in an organization in which the dismantling of white supremacy is a high priority.

How to Apply

People with disabilities, people of color, indigenous people, Hispanic/Latinx, and LGBTQ candidates are encouraged to apply. The UUA is committed to developing a diverse and talented staff team. If you are excited about this role but are unsure whether you meet 100% of the requirements, we encourage you to inquire and/or apply. Send cover letter and résumé—indicating "Associate Director of Planned Giving" in the subject line—via email to careers@uua.org, via fax to (617) 948-6467, or to Human Resources, UUA, 24 Farnsworth Street, Boston, MA 02210. Email submissions preferred.

About the UUA

The Unitarian Universalist Association is a progressive religious denomination headquartered in Boston's waterfront Fort Point Innovation District. Our faith community of more than 1,000 self-governing congregations brings to the world a vision of religious freedom, tolerance, and social justice. Our normal workweek is 35 hours, we pay 80% contribution towards health insurance premiums, 10% towards retirement (after one year), and have generous paid time-off policies. We are a great place to work, and we value diversity.

The UUA is an Equal Opportunity Employer and is committed to the full inclusion of all. As part of this commitment, the UUA will ensure that applicants and staff with disabilities are provided reasonable accommodations. If reasonable accommodation is needed to participate in the job application or interview process, to perform essential job functions, and/or to receive other benefits and privileges of employment, please contact the Office of Human Resources at (617) 948-4648 or humanresources@uua.org. For more information on the UUA, visit us at UUA.org and uuworld.org.

Support for the Mission and Values of the Association

The Unitarian Universalist Association is a progressive and historic religious denomination. While it is not generally required or expected that an applicant/employee identify as a Unitarian Universalist (UU) or be a member of a UU congregation to work at the UUA, all UUA staff members are expected to perform their job duties in accordance with the UUA's values, principles, and mission. The following points, drawn from the Seven UU Principles, are of particular importance for the UUA's work environment and staff culture:

- The inherent worth and dignity of every human being: We affirm the need for a human-centered workplace that allows our diverse staff to flourish. We also understand that our wider culture and society oppresses and denies human dignity, and we seek to counter the effects of that oppression in our hiring and workplace culture so that each person feels whole and valued.
- Justice, equity and compassion in human relations, and the goal of world community with peace, liberty and justice for all: We speak openly and publicly of our support for social and political issues, including LGBTQ equity, racial justice, climate justice, gender equity, and reproductive justice.
- The interdependent web of existence: We recognize that the liberation of all people is

interwoven, and we work to counter patriarchy, white supremacy, colonialism, homophobia, transphobia, ableism, environmental exploitation, and other interrelated systems of marginalization.