

THE UNIVERSITY OF WYOMING JOB DESCRIPTION

This is a description of a staff position at the University of Wyoming not a job opening announcement. Look for current job openings at the following link: [UW Human Resources](#).

The following statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

Title: COORDINATOR, PLANNED GIVING

Reports To: Designated Supervisor

UW Job Code: 3837

UW Job Family: 33 – Management Support

SOC Code: 13-1130

FLSA: Exempt

Pay Grade: 22

Date: 7-1-20

JOB PURPOSE:

The position reports directly to the Associate Vice President for Development and provides administrative, operational, and programmatic support for the Gift Planning Office at the UW Foundation. The position is a liaison to the Gift Planning Office and broad audience including UW and Foundation leadership, legal professionals, development staff, donors, alumni, and other constituents.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Assist with the administration of outright gifts and unrealized and realized planned gifts.
- Coordinate the estate tracking processes, including preparing letters and other correspondence for sophisticated audiences; requesting information and following up as necessary; updating CRM Advance database and internal tracking systems; and liaising with various UW Foundation offices including Gift Intake, Gift Processing, Financial Services and Accounting, Investment, Information Services, and development professionals.
- Track and oversee the office's expectancy lists and donor files, maintain a record and timeline of receipt of notice, contact points, estimated realization amount and timetable, and next steps.
- Coordinate newly documented planned gifts including monitoring chain of custody, encouraging progress through processes, coding/data entry, and monitoring periodic gift and donor reports.
- Collaborate with UWF marketing team to coordinate and execute gift planning marketing and communications and work with external marketing vendors.
- Partner with the UW Foundation Stewardship employees to execute stewardship activities for planned gift donors.
- Assist the Associate Vice President for Development and gift agreement review team with maintaining gift templates, coordinating gift review process and communication, drafting agreements from templates, and providing attention to detail in this process.
- Support the office with scheduling, travel arrangements, development correspondence, acknowledgments, proposals and other written materials.

- Organize the office's expense reports.
- Maintain and update gift planning electronic and web-based files, including documents, templates, and resources on WyoWeb.
- Serve as a liaison to UW Foundation's life income gift vendor, including providing donor information updates, coordinating the process to create new life income gifts, and assisting with the termination of life income gifts.

SUPPLEMENTAL FUNCTIONS:

- Assist with special projects as needed. Such projects may include special stewardship mailings and follow-up, drafting and/or revising gift planning templates, forms, and resources, scheduling and compiling materials for training, etc.
- Other duties as assigned.

COMPETENCIES:

- Attention to Detail
- Collaboration
- Quality Orientation
- Analysis/Problem Identification
- Adaptability

MINIMUM QUALIFICATIONS:

Education: **Bachelor's degree**

Experience: **2 years work-related experience**

Required licensure, certification, registration or other requirements: **None**

KNOWLEDGE, SKILLS, AND ABILITIES:

Knowledge of:

- Communication methods and techniques.
- Short and long-term goal setting and achievement strategies.
- Business practices, financial reporting, and cost projections.
- Computer programs and software in use in the department or area.
- Records maintenance processes and procedures.
- Scheduling techniques.
- Office management principles and practices.
- Finance, accounting, budgeting, and cost control procedures.
- Supplies, equipment, and/or services ordering and inventory control.
- Html, web page creation, and website maintenance.
- Commencement ceremony procedures, facilities, and equipment requirements.
- Accounting procedures involving procurement, travel, and/or employment.
- Project management principles, practices, techniques, and tools.
- Laws, regulations, methods, and techniques in the area of specialty.

- Current and emerging trends in technologies, techniques, issues, and approaches.
- Development and implementation of symposia, conferences and meetings including speaker selection, marketing, and follow-up assessments.

Skills and Abilities to:

- Strong interpersonal skills and the ability to work effectively with a wide range of constituencies in a diverse community.
- Ability to use discretion and independent judgment in matters of significance.
- Supervise and train others.
- Create, compose, and edit basic, routine and complex written materials.
- Communicate effectively both orally and in writing with a wide range of individuals and constituencies.
- Maintain effective supervisory relationships.
- Supervise and train assigned staff including organizing, prioritizing, and scheduling work assignments.
- Investigate, analyze information, draw conclusions, and make recommendations based on data or findings.
- Develop and maintain recordkeeping systems and procedures.
- Develop and maintain websites.
- Maintain calendars and schedule appointments.
- Manage projects to meet multiple and conflicting project timelines.
- Provide project leadership.
- Design, conduct and coordinate symposia, conferences and meetings, select speakers, market events and conduct follow-up assessments.
- Work as a team member and foster a cooperative work environment.

WORKING CONDITIONS:

No major sources of discomfort, standard office environment.

Authorized by Classification/Compensation, Human Resources

Employees may be requested to perform job-related tasks other than those specifically presented in this description. Participating in the University's hazardous waste minimization program is part of the job of each employee who uses (or may come in contact with) hazardous materials. Fair Labor Standards Act (exempt/non-exempt) is designated by position. University of Wyoming actively supports Americans with Disabilities Act and will consider reasonable accommodations.