

W

UNIVERSITY *of*
WASHINGTON

SEARCH SPECIFICATIONS



ASSISTANT VICE PRESIDENT, PLANNED GIVING

PREPARED BY:



THE OPPORTUNITY

University of Washington (UW) is seeking a collaborative, entrepreneurial development professional for a role with UW University Advancement (UA) – an Assistant Vice President, Planned Giving (AVP).

The Assistant Vice President for Planned Giving will serve as a key development and administrative leader for University Development, overseeing and ensuring the success of the Office of Planned Giving. In alignment with the values and goals of University Advancement, the AVP will lead the UW's comprehensive planned giving program. The planned giving program focuses on promoting and securing traditional planned gifts, facilitating complex outright gifts and pledges, and ensuring an appropriate focus on diversity equity and inclusion in all aspects of the program. The AVP, leading a team of eight professionals, will support the development of robust relationships between the UW and current and prospective donors, with a particular focus on fostering alignment of donor interest and institutional values and priorities.

The AVP will be a senior fundraising professional with a track record of success in managing high performing teams, with an emphasis on cultivating and soliciting top institutional prospective donors, building and sustaining internal and external relationships and managing and building a team. The AVP serves as a role model of a trusted advisor to donors and fellow development staff. The AVP will continue to build on the momentum created through a newly-developed marketing plan to identify new donors and prospective donors.

The AVP will have access to and lead strategic partnerships that maximize the power of the UW's integrated model, working across advancement disciplines to ensure strategies are comprehensive and in step with the University's open cultivation and profound engagement philosophies.

Salary Range

The salary range for the Assistant Vice President, Planned Giving, position is \$210,000 - \$250,000.

UNIVERSITY OF WASHINGTON

Since its founding in 1861, the University of Washington has been a hub for learning, innovation, problem solving and community building. Driven by a mission to serve the greater good, UW students, faculty and staff tackle today's most pressing challenges with courage and creativity, making a difference across Washington state — and around the world.

Mission

The primary mission of the University is the preservation, advancement and dissemination of knowledge.

Vision

The University of Washington educates a diverse student body to become responsible global citizens and future leaders through a challenging learning environment informed by cutting-edge scholarship. **Discovery is at the heart of the University.** By discovering timely solutions to the world's most complex problems, the University enriches the lives of people throughout the Puget Sound, the state of Washington, the nation and the world.

Values

Integrity | Diversity | Excellence | Collaboration | Innovation | Respect





UW Facts

Total Enrollment (Fall 2023): 60,094

- 43,255 undergraduate
- 17,437 graduate/professional

Areas of Study: 846 degree options across 473 academic programs

Total Degrees Awarded (2022 - 2023): 18,309

- Bachelor's – 11,532
- Master's – 5,267
- Doctoral – 886
- Professional – 594

Endowment: \$4.7 billion

Campus: 16 colleges and schools and 1,800 undergraduate courses each quarter

Faculty:

- Two National Book Award winners
- Two Pulitzer Prize winners
- Five National Medal of Science winners
- Six Nobel Prize winners
- 15 MacArthur Fellows

UW ADVANCEMENT

Guided by their mission, vision and values, UW Advancement strives to make the University of Washington the world's greatest public university, as measured by their impact.

This goal is made possible by a fully integrated advancement model, which brings together development, alumni and stakeholder engagement and marketing and communications. In partnership with the UW Foundation and the UW Alumni Association, UW Advancement creates meaningful connections with stakeholders that foster pride, advocacy and philanthropic support.

This integrated model was core to the recently-concluded *Be Boundless* campaign, which inspired gifts from more than half a million donors totaling \$6.3 billion for Washington and the world.

Mission

Grow relationships, resources and reputation to advance the priorities of the University and improve the lives of the students, patients, communities, state and world it serves.

Vision

Unite and expand a diverse, engaged community of supporters to advance the positive impact of the University of Washington.

Values

It starts with me

- I have uncompromising integrity.
- I am bright, hardworking and kind.
- The mission matters deeply to me.

Our best work is done together

- We are trustworthy and transparent.
- We listen and empathize.
- We learn from one another, celebrate our success and embrace the journey.

We create impact

- Together we effect positive change for those we serve and in our communities.
- Together we strive for a diverse and equitable workplace and world.
- Together we move our mission forward.



UW Planned Giving

The UW Office of Planned Giving brings decades of knowledge to donors who wish to make a future gift in a variety of vehicles.

- Charitable Gift Annuity
- Charitable Remainder Trust
- IRA Charitable Rollover
- Real Estate
- Securities
- Charitable Lead Trust
- Personal Property
- Wills and Living Trusts
- Beneficiary Designations



Planned Giving Fundraising Results - A Five-year Average

Estate Distributions	\$40M
Avg. # of Estates	112
Irrevocable Deferred Gifts	\$3.9M
Testamentary Gift Expectancies	\$20M
Outright Gifts (stock, cash, QCD)	\$5M



UW Planned Giving

Henry Suzzallo Society, a Planned Giving recognition society

This exclusive fellowship of University supporters was named for the UW's visionary 16th president, Henry Suzzallo, who called on Washington citizens to help create "a university of a thousand years." To celebrate donors who have included the UW in their estate plans, the University offers membership in the Henry Suzzallo Society. Members receive an invitation each year to an exclusive Suzzallo Society event.

Areas of gift focus:

- Help students achieve their academic dreams with scholarship support
- Facilitate the next research breakthrough by supporting faculty research
- Provide resources for programs and departments



LEADERSHIP PROFILES

Ana Mari Cauce President

As the president of one of the world's great public universities, Ana Mari Cauce is leading the University of Washington in advancing its mission in four key areas: providing a leading-edge student experience, conducting research and scholarship that has a global impact, upholding the UW's dedication to its public mission and infusing the entire University with a commitment to innovation.



Throughout her career, Cauce has championed access to higher education, including through the [Husky Promise](#), which provides full tuition to eligible Washington students who otherwise could not attend college. As part of her strong belief in ensuring access to higher education for all, just one month into her role as interim president she engaged students in an honest discussion about race and equity, [launching an effort](#) to create a more just and diverse community.

Raised in Miami after emigrating with her family from Cuba, Cauce earned a B.A. in English and psychology from the University of Miami and a Ph.D. in psychology, with a concentration in child clinical and community psychology, from Yale University.

Cauce is a professor of Psychology and American Ethnic Studies, with secondary appointments in the Department of Gender, Women and Sexuality Studies and the College of Education. She maintains an active research program, focusing on adolescent development, with a special emphasis on at-risk youth. She is also a strong advocate for women and underrepresented minorities to pursue careers in science, technology, engineering and mathematics. Cauce remains active in the classroom and continues to teach and mentor undergraduate and graduate students.

For a full biography, visit [washington.edu/president/biography](http://www.washington.edu/president/biography).

LEADERSHIP PROFILES

Mary Gresch **Senior Vice President for** **University Advancement**

Mary is Senior Vice President for University Advancement at the University of Washington, overseeing the marketing and communications, development, alumni and stakeholder engagement and advancement operations functions.



Mary's career has been defined by a brand and mission-focused approach to building integrated strategy and structures for University Advancement — uniting the disciplines of communications and marketing, alumni relations and development to serve the University's public mission and aspirations with the greatest possible impact. She serves on the University's Race and Equity Steering Committee and believes deeply in building shared equity leadership and in University Advancement's role in building community internally and externally.

Prior to her appointment as Senior Vice President, Mary served as Vice President for Communications and Chief Marketing Officer for the University of Washington since 2013. Prior to joining the UW, she was the principal at Mary Gresch & Associates and served in communication capacities at Washington State University — including as the Associate Vice President for Strategic Communications and Marketing and Director of Foundation Communications. Prior to her tenure at WSU, Mary was the director of public relations and publications at the Cate School in Carpinteria, California, and a development coordinator for the National Multiple Sclerosis Society.

LEADERSHIP PROFILES

Tamara Michel Josserand **Vice President for Development**

Tamara Michel Josserand is Vice President for Development at the University of Washington. She leads university-wide fundraising, partnering with development professionals across all three campuses and works with philanthropic and civic leaders to galvanize support of the UW's work to expand access to educational opportunities.



Together with development professionals in UW's schools, colleges, campuses, units and central programs, she works to inspire fundraising success that supports the University's mission vision and values.

Tamara has more than three decades of successful experience working in institutional advancement and strategic leadership roles at both public and private institutions. Prior to joining the UW in 2022, she led advancement at the University of Redlands in California, where she successfully completed a historic \$206 million comprehensive campaign. She has also held key roles and leadership positions at the University of Illinois at Chicago; the University of Nevada, Las Vegas; University of Chicago; Northwestern University; and Yale University. She has served as a senior consultant for the national fundraising consulting firm, Campbell & Company.

Her work is guided by a deep belief in the value of higher education, passion for student success, and commitment to diversity, equity, inclusion and belonging.

Tamara earned her B.A. in Government from Connecticut College, a Master of Education at Harvard University's Graduate School of Education and an MBA from the University of Chicago Booth School of Business.

LEADERSHIP PROFILES

Stephanie Doyle **Associate Vice President of** **Development Programs and Strategy**

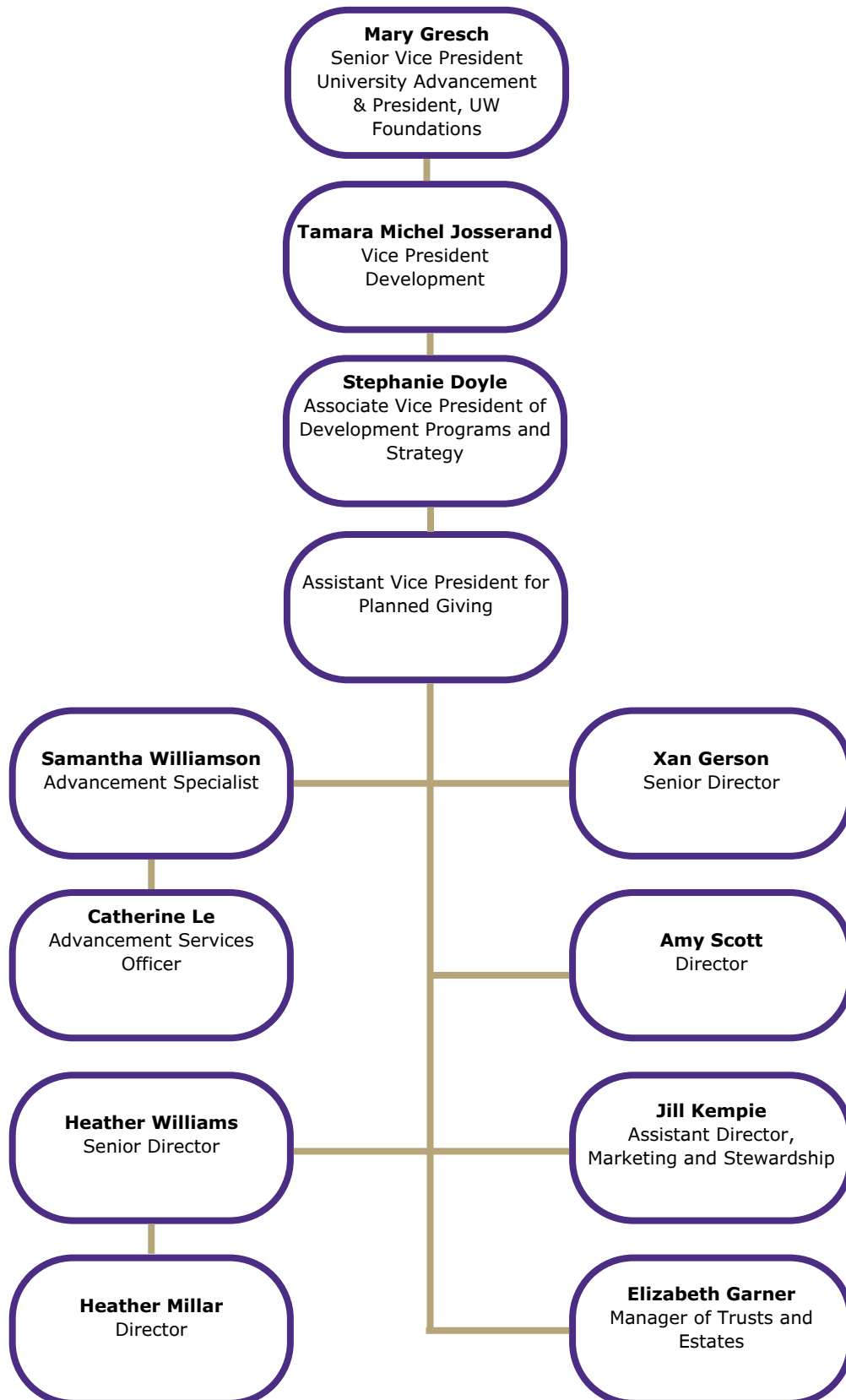
Stephanie Doyle is the Associate VP for Development Programs and Strategy at the University of Washington. Stephanie is responsible for the leadership and management of university-wide fundraising programs including regional giving, international advancement, planned giving, corporate and foundation relations and development services, which includes annual philanthropy, endowment and donor services, philanthropic recognition programs and prospect development. In addition, Stephanie works closely with Vice President for Development Tamara Michel Josserand on Development-wide programs and initiatives, including Development leadership onboarding; professional development and meetings; all-staff trainings and meetings; goal-setting and metrics; Development DEI work.



Stephanie began her career in Alumni Relations and then moved to the Regional Giving team as a major gift officer, where she served in various roles for over 20 years. She oversaw the creation of the UW's International Advancement program and has worked with local and regional donors on transformational gifts in support of University priorities. In 2023, she stepped into the Associate VP role, and has guided several key initiatives, including a Development organizational restructure, program assessments and reviews, and Campaign readiness.

Stephanie is a graduate of the UW, with degrees in political science and speech communication. She has a passion for building and serving on formal and informal teams that support the university's values including serving as chair of Advancement XLT (Extended Leadership Team), interim CAO in the UW's College of the Environment, and volunteer lead for UW Advancement's Martin Luther King Day of Service project for the past 15 years.

UW Planned Giving



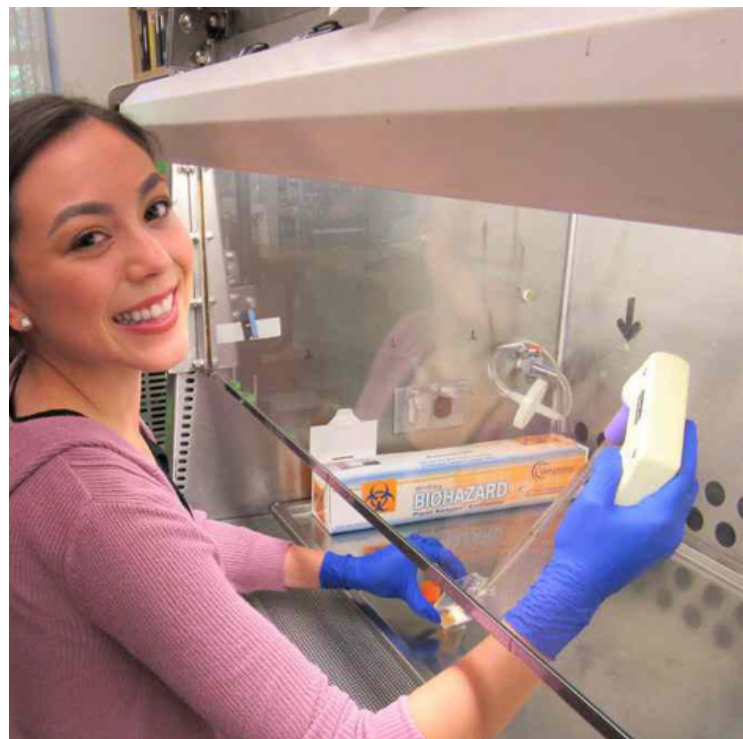
POSITION DESCRIPTION

The Assistant Vice President for Planned Giving will serve as a key development and administrative leader for University Development, overseeing and ensuring the success of the Office of Planned Giving. The AVP will serve as a key development and administrative leader for University Development, overseeing and ensuring the success of the Office of Planned Giving. The planned giving program focuses on promoting and securing traditional planned gifts, facilitating complex outright gifts and pledges, and ensuring an appropriate focus on diversity, equity and inclusion in all aspects of the program.

The AVP will support the development of robust relationships between the UW and current and prospective donors, with a particular focus on fostering alignment of donor interest and institutional values and priorities.

The Assistant Vice President will serve as the University's lead planned gift strategist and prioritize the effort to increase the pipeline for planned gifts as well as the ongoing opportunities to evolve this work, fundraising strategies, and tools. This role will promote the alignment of gift impact to advance university priorities while ensuring the team's strategy aligns with institutional values.

The AVP will work across all University programs and departments and collaborate closely with a broad and diverse spectrum of individuals, including volunteer leaders, individual prospective donors and their advisors, as well as others at the University of Washington. This role will help instill confidence among fundraisers concerning planned gifts, thereby adding value to their individual and collective efforts. The AVP will directly engage, cultivate and steward alumni and friends of the university as they consider their philanthropic support. This role will also serve as part of various UA leadership teams and invest in the success and growth of the individual members of the Office of Planned Giving.



DUTIES AND RESPONSIBILITIES

The AVP will have demonstrated deep experience with leadership and management, frontline fundraising and strategy development.

Leadership and Team Management (20%)

Provides leadership to and manages the Planned Giving team. Creates and manages the goals, annual plans and budget and ensure appropriate alignment with units' annual plans. Attracts and retains top-level team members with diverse backgrounds, experiences and perspectives, committed to institutional DEI mission and values. Provides consultation and support to other areas of the Development Programs (DP) team and across UA, with a priority on the partnership with the Principal Giving team, including University Initiatives.

Frontline Fundraising (35%)

Identifies, cultivates, solicits and stewards planned giving prospective donors for major outright and planned gifts to support university priorities. Thinks broadly and creatively about strategies to engage and cultivate a defined group of planned gift prospective donors to secure planned gifts to meet university priorities. Partners with schools, colleges and programs to secure gifts of impact.

Program Development and Management (30%)

Develops, implements, manages and evaluates processes central to the Planned Giving program, while working collaboratively with the VP of Development, deans, other organizational leaders and campus partners. Continue to develop the Planned Giving team a focus on and commitment to UA values and priorities, emphasizing diversity, equity and inclusion throughout the enterprise. Identifies and creates university-wide strategies, including but not limited to staff training programs, data analytics and marketing campaigns for Planned Giving. Develops and oversees a budget and annual operating plan to maximize the university's Planned Giving efforts' effectiveness.

Relationship Management (15%)

Conduct regular meetings with fundraisers and their supervisors to review and revise individual prospect plans and/or strategies and track stewardship plans for planned prospective donors. Along with the Planned Giving Team, actively participate in the regular review of fundraising results and tactics. Participate in the strategic planning for campaigns.

Requirements

- A bachelor's degree and 10 years of progressive experience in institutional development/advancement, with an emphasis on cultivating and soliciting top institutional prospective donors, building and sustaining internal and external relationships, and managing and building a team.
- Equivalent development/advancement experience outside of higher education may substitute for educational institution experience.
- Demonstrated commitment to valuing diversity and creating a safe, welcoming, inclusive work environment where creativity is encouraged and collaboration is expected.
- Exceptional interpersonal, verbal and written communication skills and an ability to work both independently and as part of a team.

University of Washington EEOC

Committed to attracting and retaining a diverse staff, the University of Washington will honor your experiences, perspectives and unique identity. Together, the UW community strives to create and maintain working and learning environments that are inclusive, equitable and welcoming.

[The University of Washington is an affirmative action and equal opportunity employer.](#) All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, gender expression, national origin, age, protected veteran or disabled status or genetic information.

To request disability accommodation in the application process, contact the Disability Services Office at 206-543-6450 or dso@uw.edu.

Applicants considered for this position will be required to disclose if they are the subject of any substantiated findings or current investigations related to sexual misconduct at their current employment and past employment. Disclosure is required under Washington state law.

The base salary range for the AVP, Health Sciences is \$210,000 to \$250,000, commensurate with experience and qualifications, or as mandated by a U.S. Department of Labor prevailing wage determination.



SEATTLE, WASHINGTON

Seattle is a city of possibilities. And for UW, it's a classroom and partner. As one of the nation's fastest-growing cities, Seattle's success is interwoven with the University of Washington. Thousands of UW alumni and adopted Huskies have developed the business, industrial and creative legacy of the Puget Sound region. Home to Amazon, REI, Microsoft, Boeing, Costco and Starbucks, the Seattle area offers a vibrant, innovative and fast-paced environment.

Hundreds of independent philanthropic foundations anchor the region's strong culture of giving and civic duty. Seattle-rooted giants in the field include the Bill & Melinda Gates Foundation, the Washington Research Foundation, PATH, the Marguerite Casey Foundation and the Paul G. Allen Family Foundation.

The city and surrounding area offer many options for public and private K-12 education, as well as excellent health care and public transportation. The University is home to UW Medical Center and Harborview Medical Center, both renowned for their research-based clinical care.

Commuting by public transit is easy and convenient, as Link light rail runs from Sea-Tac International Airport through downtown to the UW campus and farther north (the system will expand north, south and east in the coming years), and several bus lines serve the UW.

Learn more about this temperate region with abundant outdoor recreation, shopping and entertainment online at visitseattle.org.

APPLICATION PROCEDURE

To be considered for the Assistant Vice President, Health Sciences opportunity at the University of Washington, please submit your resume of qualifications and a letter of interest (no longer than two pages), that includes a paragraph on your perspective on managing teams and mentoring, in confidence to Katie Riecke at kriecke@bryantgrp.com.



Katie Riecke
Talent Associate
BRYANT GROUP
kriecke@bryantgrp.com



Chris Bingley
President
BRYANT GROUP

**Priority will be given to candidate materials received by
March 29, 2024.**



Bryant Group, based in Dallas, Texas, and with associates located across the United States, specializes in executive search and leadership consulting for higher education, healthcare and nonprofits. In 1988, Bryant Group founder, Chris Bryant, started one of the country's first search firms specializing in philanthropy recruitment. Now under the leadership of CEO Sally Bryant, the woman-owned firm has impacted more than 10,000 leaders and served more than 275 organizations.

Our commitment to people and our determination to live our values every day, in every conversation, make our firm unique. We like to think of it as being uncommon on purpose, which can be seen in the high level of service we provide our client in- executive search, leadership development and talent strategy.

Visit our website today at www.bryantgrp.com to learn more about how we can help you achieve your goals.