



Real Estate and Planned Gift Administration Specialist

Job ID 71317 – [Apply here](#)

Job Summary

Under the direction of the Executive Director and Counsel for Planned Gift Administration, provide experienced, programmatic, analytical, technical and administrative services for the Office of Planned Giving. Actively manage the split interest (“life income”) gift portfolio and complex asset gift transactions for the University of California, Davis – both the Davis and Sacramento campuses. Uses seasoned, professional skills to document, track, book, and report, manage due diligence, acceptance, tracking, booking, and reporting of Life Income and Complex Asset Gifts, including gifts of real estate and business interests. Partners with and provides consultation to campus-wide and system-wide colleagues, including the chancellor, provost, deans, faculty and staff, and interacts with university agents, UC Davis Foundation trustees, alumni, business and community leaders, attorneys, accountants, financial advisors, donors, alumni, and others in carrying out the responsibilities of the position.

This position requires good judgment in selecting methods and techniques for obtaining solutions, and works independently, collaboratively, and collegially as part of a diverse, matrix organization.

This position is based in Davis, CA and may be eligible for flexible work arrangements, including a hybrid schedule.

[Apply By](#) Date: August 20, 2024 at 11:59pm

Qualifications

Minimum Qualifications

For full consideration, applicants are encouraged to upload license, certification and/or educational degree if required of the position.

- Bachelor’s degree or equivalent relevant experience or training in real estate acquisition; real estate, trust and estates legal firms; estate planning documents; and/or irrevocable gift instruments, such as charitable remainder trusts, charitable gift annuities, pooled income funds, retained life estates, and charitable lead trusts.
- Thorough knowledge and understanding in reviewing, comprehending, interpreting, and applying complex policies and procedures, informational materials, legal documents and a variety of different tax codes, revenue procedures, court cases and statutory regulations and laws relating to charitable gift planning and administration. Experience in a University setting is a plus.
- Knowledge and skills to collect information, perform research and related activities for the evaluation required to accept and dispose of gifts of real property.
- Strong organizational, presentation and negotiation skills to assist in the production of informational material and reports, including graphic presentations of complex planned gift arrangements (such as flow charts) that prospective donors can easily understand.
- Thorough interpersonal, oral and written communication experience to effectively interact with alumni, donors and their professional advisors and to meet their needs in a responsive and professional manner, as well as to prepare a variety of correspondence, reports, and agreements related to life income gift administration.

- Meticulous planning and organizational experience to determine competing workload priorities and skill to meet deadlines, goals, and objectives; flexibility to shift priorities as urgency dictates; experience to work with a high degree of autonomy using sound judgment and troubleshoot issues and situations; and ability to initiate and follow through on tasks despite heavy workloads, frequent interruptions, and/or distractions.

Preferred Qualifications

- Notary Public certification, or ability to successfully obtain certification within 6 months.
- Skills to provide on demand planned gift calculations, scenarios, and sample language to the campus' development officers.
- Knowledge of endowments, the law governing endowments, and the policies and practices of endowment administration, preferably within a higher education institution or at UC Davis.
- Awareness, knowledge, and skill in applying diversity, equity and inclusion to one's work. A profound belief in the value of a diverse and safe workforce and a commitment to achieve this goal through collaboration and team building, working cooperatively with a diverse group of department and campus constituencies.

Key Responsibilities

- 50% - LIFE INCOME GIFT ADMINISTRATION
- 40% - COMPLEX ASSET GIFT ADMINISTRATION
- 10% - PLANNED GIVING/DONOR SUPPORT

Department Overview

Development & Alumni Relations (DEVAR) provides leadership in building enduring public trust, understanding, and support for UC Davis and its mission of teaching, research, and public service. DEVAR provides leadership, coordination and support services to help the university meet its mission of research, teaching and service by building philanthropic support and executing approved fundraising programs that support the university's highest priorities and initiatives.

As part of the Division of Development and Alumni Relations (DEVAR), the University Development Office (UDev) provides leadership, support, and coordination and services to help build philanthropic support for UC Davis' research, teaching, and service mission and its related fundraising priorities to meet its goals.

Position Information

- **Salary or Pay Range: \$62,000/yr. - \$109,000/yr. (Dept. budgeted salary: \$62,000/yr. - \$81,708/yr. Commensurate with experience.)**
- **Salary Frequency: Monthly**
- **Salary Grade: 20 CT**
- **UC Job Title: ALUMNI EXTERNAL REL SPEC 3**
- **Number of Positions: 1**
- **Appointment Type: Career**
- **Percentage of Time: 100%**
- **Shift Hours: Monday-Friday, 8am-5pm**
- **Location: Davis, CA**
- **Union Representation: No**
- **Benefits Eligible: Yes**
- **Hybrid/Remote/On-Site: Hybrid**

Benefits

Outstanding benefits and perks are among the many rewards of working for the University of California. UC Davis offers a full range of benefits, resources and programs to help you bring your best self to work, as well as to help you

and your family achieve your health, wellness, financial and career goals. Learn more about the benefits and eligibility rules by visiting [Benefits Summary for UC Davis Health Employees](#) or [Benefits Summary for UC Davis Employees](#) and our [Benefits Page](#).

If you are represented by a union, benefits are negotiated between the University of California (UC) and your union and finalized in a contract. Read your bargaining unit's employment contract, stay abreast of current negotiations and learn about collective bargaining at UC: <https://ucnet.universityofcalifornia.edu/labor/bargaining-units/index.html>

- High quality and low-cost medical plans to choose from to fit your family's needs
- For eligible roles, UC pays for Dental and Vision insurance premiums for you and your family
- Extensive leave benefits including Pregnancy and Parental Leave, Family & Medical Leave
- Paid Holidays annually as stipulated in the UC Davis Policies or Collective Bargaining Agreement
- Paid Time Off/Vacation/Sick Time as stipulated in the UC Davis Policies or Collective Bargaining Agreement
- Continuing Education (CE) allowance and Education Reimbursement Program as stipulated in the UC Davis Policies or Collective Bargaining Agreement
- Access to free professional development courses and learning opportunities for personal and professional growth
- WorkLife and Wellness programs and resources
- On-site Employee Assistance Program including access to free mental health services
- Supplemental insurance offered including additional life, short/long term disability, pet insurance and legal coverage
- Public Service Loan Forgiveness (PSFL) Qualified Employer & Student Loan Repayment Assistance Program for qualified roles
- Retirement benefit options for eligible roles including Pension and other Retirement Saving Plans. More information on our retirement benefits can be found [here](#)
- UC Davis cares about building a community, which is why we provide resources to enhance [diversity, equity and inclusion](#) as well as [Employee Resource Groups](#) (ERGs) to support our staff

Physical Demands

- Mental Demands – Analytical and Problem Solving - Frequently, Confidentiality - Constantly, Constant Interruptions - Frequently, Customer Contact - Frequently, Detailed Work - Constantly, Math - Frequently, Multiple Concurrent Tasks - Constantly, Reading (documents or instruments) - Constantly, Reasoning - Constantly, Verbal Communication - Constantly, Written Communication - Constantly
- Physical Demands – Attendance - Constantly, Driving - Occasionally, Sitting - Frequently, Speaking - Frequently, Writing - Constantly, Talk or Hear - Constantly, Cleaning - Occasionally, Kneeling - Occasionally, Pulling - Occasionally, Pushing - Occasionally, Reaching - Occasionally, Walking - Frequently
- Lifting Requirements – Up to 10 Pounds (Sedentary) - Occasionally, Up to 25 Pounds (Light) - Occasionally
- Noise Conditions – Moderate Noise Conditions - Frequently, Quiet Noise Conditions - Occasionally, Loud Noise Conditions - Occasionally, Ability to Adjust Focus - Occasionally

Work Environment

- Work occasional evenings and weekends to meet operational needs or attend fundraising events.

- The Smoke and Tobacco Free Environment policy is intended to provide a healthier, safer, and more productive work and learning environment for the entire UC community. The University of California prohibits smoking and tobacco use at all University owned or leased properties, or facilities operated by UC staff or faculty. Smoking and tobacco use are strictly prohibited in indoor and outdoor spaces, parking lots, residential space, and University vehicles. <https://ucdavispolicy.ellucid.com/documents/view/271>

Special Requirements

This is a critical position, as defined by UC policy and local procedures, and as such employment is contingent upon successful completion of background check(s), including but not limited to criminal record history background check(s)

Diversity, Equity, Inclusion and Belonging

At UC Davis, we're solving life's most urgent challenges to bring a fuller, healthier, and more resilient world within reach. We grow from every challenge we take on and we don't just maintain - we improve. We recognize that creating an inclusive and intellectually vibrant organization means understanding and valuing both our individual differences and our common ground. The most comprehensive solutions come from the most diverse minds, and you belong here. As you consider joining UC Davis, please explore our [Principles of Community](#), our [Clinical Strategic Plan](#) and [strategic vision](#) for research and education, and our latest efforts to [outgrow the expected](#). The University of California, Davis is an Equal Opportunity/Affirmative Action Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, age or protected veteran status.

For the University of California's Affirmative Action Policy please visit: <https://policy.ucop.edu/doc/4010393/PPSM-20>.

For the University of California's Anti-Discrimination Policy, please visit: <https://policy.ucop.edu/doc/1001004/Anti-Discrimination>.

Because we want you to be seen, our recruiting process at UC Davis fosters authenticity, diversity, and inclusion. Studies have shown that some people may not apply to jobs unless they meet every single qualification. Each unique role at UC Davis has a set of requirements and you could be perfect for this role, or you could be perfect for the next role! Don't meet all the requirements? We still encourage you to apply! #YouBelongHere