



## University of California, Irvine

Executive Director of Planned Giving  
University of California, Irvine  
Irvine, California

### THE SEARCH

Since its founding in 1965, the University of California, Irvine (UC Irvine) has quickly become one of the nation's top-ranked public universities and one of the most dynamic campuses in the world-renowned University of California system. For nearly 60 years, UC Irvine has advanced its mission to catalyze the community and enhance lives through rigorous academics, cutting-edge research, dedicated public service, and exceptional patient care. As the university further cements its prominence and expands its impact in Orange County and beyond, it seeks an experienced, driven, and collaborative individual to serve as the Executive Director of Planned Giving (EDPG), charged with strategically leading a significant and high-performing program within the division of University Advancement & Alumni Relations (UAAR). The EDPG joins at an exciting time of growth and momentum as the university nears the successful completion of *Brilliant Future: The Campaign for UC Irvine*. The largest philanthropic effort in Orange County's history, the *Brilliant Future* campaign has already surpassed its \$2 billion goal, for which 42 percent of campaign funds raised resulted in planned gifts. Building on this success, the EDPG will define an ambitious vision and provide the necessary leadership to further elevate UC Irvine's planned giving operation and strategic gift planning efforts.

Reporting to the Associate Vice Chancellor for Strategic Philanthropy, the EDPG will be a key partner to all UC Irvine fundraising units, building bridges to significantly increase the volume and impact of the university's planned giving efforts. The EDPG will identify, cultivate, and solicit major outright and deferred gift prospects and donors, and those whose gifts involve complex tax and investment planning considerations. The EDPG will market varied deferred and outright giving vehicles to both internal and external audiences and provide leadership and technical assistance to donors, volunteers, and UAAR colleagues regarding tax and financial aspects of charitable giving. With oversight for two staff members, a director of planned giving and a planned giving coordinator, the EDPG will position the team to serve as the campus' gift planning experts and strategic partners.

With at least seven years of experience in successful development and fundraising programs, preferably within higher education, the EDPG must possess knowledge of principles and best practices of fundraising for a comprehensive research university, including the ability to direct and grow a complex planned giving

program. The successful candidate will bring demonstrated success in personally implementing sophisticated, multi-year cultivation strategies that leverage a relationship-building and moves management approach to leading successful gift closure. The EDPG will also have a proven track record of significant personal success in donor cultivation, solicitation, and stewardship at significant planned giving levels.

With strong managerial, strategic planning, and motivational skills, the successful candidate will be a proactive, highly collaborative professional adept at forging strong partnerships across all fundraising units to foster confidence and increase activity levels in planned giving. Equally important are excellent communication and negotiation skills, as well as the astute ability to respond and act effectively in a complex environment, oftentimes with conflicting demands. The successful candidate will be a self-assured, results-oriented advancement professional with a collegial and accessible leadership style, and a deep appreciation for and alignment with the mission, goals, and values of UC Irvine. A bachelor's degree is required; an advanced degree, such as a masters of business administration or juris doctor, is preferred.

UC Irvine has retained Rachel Ellenport of the executive search firm Isaacson, Miller to conduct this important recruitment. Confidential inquiries, nominations, and applications may be directed to the search firm as indicated at the end of this document.

## UNIVERSITY ADVANCEMENT

[University Advancement & Alumni Relations](#) (UAAR) at UC Irvine employs more than 200 full-time staff, including the UC Irvine Foundation, strategic philanthropy, health advancement, and alumni relations, as well as external relations and support staff for its fundraising efforts. UAAR operates with a federated model; in addition to the central services and principal fundraising, embedded fundraising teams lead 20 school and unit-based development and alumni engagement efforts. UC Irvine recently closed its most successful fundraising year on record, raising \$343 million in Fiscal Year 2024.

Current fundraising priorities are aligned with UC Irvine's [strategic plan](#) and *Brilliant Future: The Campaign for UC Irvine*, which include garnering resources for research, faculty support, student scholarships, and graduate fellowships; enhancing the student experience; and capital projects. Given that UC Irvine is just 60 years into its existence, there is significant opportunity to enhance the philanthropic engagement of the university's approximately 265,000 alumni, affectionally referred to as Anteaters.

### Planned Giving

UC Irvine's [planned giving program](#) currently raises between \$35 million and \$40 million-plus annually through a combination of current and deferred gifts. The centralized planned giving program, comprised of three full-time employees (including the EDPG), is a resource for all UC Irvine schools and units. All planned giving marketing is conducted in-house, leveraging Crescendo Interactive software as the primary marketing tool. As evidenced by the significant planned giving contributions to the *Brilliant Future*

campaign, there exists tremendous opportunity for continued growth of the planned giving program and strategic collaboration with colleagues across the university.

### ***Brilliant Future: The Campaign for UC Irvine***

With the successful conclusion in 2015 of the *Shaping the Future Campaign*, UC Irvine became the youngest university in the country and the only institution in Orange County ever to complete a \$1 billion fundraising campaign. Building on this success, UC Irvine publicly launched [\*Brilliant Future: The Campaign for UC Irvine\*](#) in October 2019 with unprecedented fundraising sights of at least \$2 billion. The university surpassed its fundraising goal ahead of schedule in January 2025, along with its engagement target to foster connections with more than 75,000 alumni. With the *Brilliant Future* campaign scheduled to conclude on October 4, 2025, UC Irvine is focused on sustaining its momentum, thanks to the steadfast support of dedicated partners who have driven its success.

The *Brilliant Future* campaign has already transformed the university and the communities it serves via:

- \$2 billion raised, with 70 percent of the gifts under \$100, demonstrating the power of collective generosity
- More than 113,000 donors, 80 percent of whom contributed for the first time
- Over 75,000 alumni engaged, fostering a vibrant network for Anteaters worldwide
- More than \$180 million dedicated to student support, creating over 250 new scholarship, fellowship, and student award funds
- More than \$1.4 billion raised for research and departmental support, fueling breakthroughs in medicine, engineering, humanities, and more
- Five state-of-the-art buildings funded, with more innovative spaces underway
- 111 percent growth in alumni chapters/networks across the world

In 2017, the campaign's largest gift to date – [\\$200 million from Susan and Henry Samueli](#) – established the Susan & Henry Samueli College of Health Sciences, the nation's first university-based health sciences enterprise to integrate holistic and integrative approaches in research, teaching, and patient care.

While UC Irvine celebrates the campaign's current success, leaders emphasize that the journey continues. Key priorities moving forward include:

- **Supporting Students:** Increasing scholarships and fellowships to ensure access and success for all.
- **Advancing Healthcare Innovation:** Completing the UCI Health – Irvine medical campus, which includes a state-of-the-art, 144-bed hospital and emergency department set to open in late 2025. The campus will also feature leading-edge facilities such as the Chao Family Comprehensive Cancer Center & Ambulatory Care and the Joe C. Wen & Family Center for Advanced Care – redefining healthcare for coastal and south Orange County.
- **Driving Innovation for Global Solutions:** Ensuring capacity to lead advancements in sustainability, artificial intelligence, health equity, and other pressing priorities.

In the final months of the *Brilliant Future* campaign, UC Irvine invites alumni, friends, and supporters to seize the unique opportunity to be part of a historical moment and help shape a legacy that will inspire generations to come.

## ROLE OF THE EXECUTIVE DIRECTOR OF PLANNED GIVING

Reporting to Roland Ho, Associate Vice chancellor for Strategic Philanthropy (AVC), the EDPG will expertly lead and provide oversight of the planned giving program within University Advancement & Alumni Relations. Serving as a strategic gift planning expert across campus, the EDPG will provide leadership and technical assistance to UAAR colleagues, campus partners, donors, and volunteers regarding the tax and financial aspects of charitable giving. The EDPG will also contribute to the successful conclusion of the *Brilliant Future* campaign and, importantly, organize and direct the planned giving team for future fundraising endeavors.

## CORE FUNCTIONS AND RESPONSIBILITIES

- Provide overarching vision and strategic direction, and serve as the lead development professional, for the planned giving program, which includes donors capable of making significant contributions to the campus and/or medical center.
- Plan, organize, and direct large-scale planned giving fundraising campaigns which include: gifts that involve real estate; closely held and publicly traded stock; all forms of life income gifts; retained life estate gifts; charitable lead trusts; bargain sale gifts; and revocable gift commitments, such as will bequests and beneficiary designations for retirement plans and life insurance policies. Ensure that results have a major impact on the overall goals of the program.
- Craft, implement, and evaluate individualized marketing plans and strategies for cultivation and solicitation of planned giving prospects, applying a high degree of innovation.
- Develop proposals for solicitation of high value planned giving individuals, utilizing tax law concepts to prepare gift proposals and other special materials for use during donor cultivation and solicitation. In doing so, present formal fundraising proposals and illustrations, transfer documents, bequest language, and other gift agreements to secure major outright and deferred gifts to major donors and prospects.
- Consult with donors' advisors responsible for the completion of gift agreements. Inform the tax, legal, and financial advisors of the university policies for planned gifts. Assist prospective donors and their advisors in clarifying objectives and obtaining and recording pertinent information.
- In partnership with the AVC, analyze needs and create strategic and long-range plans for planned giving programs. As needed, make commitments and precedent-setting decisions regarding program design, development, and procedures. Ensure that predetermined fundraising goals are met.

- Conduct at least 120 documented, meaningful contacts per year, leading to new gifts and commitments of at least the following minimum annually: \$15 million annually in year one; \$20 million annually in year three; and \$25 million annually in year five.
- Support school, college, and program-based efforts to promote complex outright and deferred gifts by assuming a leadership role in devising various marketing plans for each unit across campus. Partner with, train, and mentor unit-based development colleagues, as well as central major gift officers, to secure deferred and complex outright gifts and develop planned giving techniques and strategies.
- Manage, mentor, and train a small team that is prepared to meet the ongoing challenges and aspirational goals of planned giving and central advancement. Promote excellence through well-defined and measurable goals; inspire, empower, and motivate staff through active communication and delegation; and place staff members' work within the context of overarching planned giving strategic priorities.
- Maintain expert and current knowledge of all estate planning, tax legislation impacting charitable giving, and deferred giving techniques. Provide up-to-date information on these matters to development colleagues and other campus constituencies, as appropriate.
- Occasionally attend functions and meetings, and serve on internal and external committees, as a representative of the planned giving division.

## QUALIFICATIONS AND EXPERIENCE

- Seven to ten years of successful professional development and/or fundraising-related experience, preferably in higher education, or any equivalent combinations of education and/or experience from which comparable knowledge, skill, and abilities have been achieved.
- Experience-based knowledge of principles and practices of fundraising for a comprehensive research university, including the ability to direct a complex planned giving program and advanced knowledge of applicable laws, rules, regulations, policies, etc.
- Proven track record of significant personal success in planned giving, including donor cultivation, solicitation, and stewardship at major and principal gift levels. Demonstrated experience in stewardship plans leading to additional investments.
- Extensive experience in the completion of complex and detailed planned giving proposals and related specialized materials.
- Experience operating under a prospect moves management system that utilizes a central database. Documented success personally implementing sophisticated, multi-year cultivation

strategies that leverage a relationship-building and moves management approach, leading to successful gift closure.

- The political savvy to navigate a complex academic community, and the desire and ability to build bridges and strong collaborative relationships with all members of a complex operation and a diverse body of alumni and constituents. An interest in serving as a resource to others and obtaining their input; persuasive, persistent, and determined.
- Superlative interpersonal and listening skills, a calming influence, and a demonstrated ability to work well with individuals at all levels of an organization, across a diverse range of educational and social backgrounds, and to demonstrate honest respect for everyone. The ability to succinctly communicate a vision and process to key constituents, utilizing data and metrics as appropriate as a foundation for advancement programs.
- Strong management and leadership experience, including the ability to empower, build initiative, and sustain motivation of staff and to create effective, cohesive teams.
- Working knowledge of productivity software and CRM systems such as Salesforce, Raiser's Edge, or other comparable donor/prospect database systems.
- The ability to understand, reflect, and promote the culture, values, and achievements of UC Irvine with integrity, collegiality, and excellence permeating each component of the university's mission.
- The ability to operate effectively with flexibility and collegiality in a fast-paced, demanding, and complex organizational environment.
- Honesty, integrity, enthusiasm, and perspective; sound judgment; and a strong work ethic, supported by commitment and follow-through.
- A bachelor's degree is required; an advanced degree (JD or MBA) is preferred.

## COMPENSATION AND LOCATION

The pay range for this position is \$116,000 - \$224,200 (Grade 26). The expected pay range for this recruitment is \$185,000- \$210,000 (Annual). In addition to the salary range listed herein, UC Irvine offers a wealth of benefits to make working at the university even more rewarding. These benefits may include medical insurance, sick and vacation time, retirement savings plans, and access to a number of discounts and perks. Please utilize the links listed here to learn more about our [compensation practices](#) and [benefits](#). Salary offers are determined based on final candidate qualifications and experience; the budget for the position; and in support of fair, equitable, and consistent pay practices at the university.

Irvine, California is in the heart of Orange County, with two major freeways, rail service, and its own airport – John Wayne Airport. Laguna Beach, Huntington Beach, Corona Del Mar, and Catalina Island are only a

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short distance away. Irvine is located less than an hour from Los Angeles International Airport and downtown Los Angeles. The city of Irvine, incorporated in 1971, is among the nation's largest planned urban communities, encompassing more than 65 square miles, and is consistently ranked as one of the best and safest places to live in the United States. Irvine enjoys the best of what Southern California has to offer: beaches, mountains, deserts, and a broad array of cultural, entertainment, and intellectual activities. To learn more about Irvine, please visit: <https://www.destinationirvine.com/>

## APPLICATIONS, INQUIRIES, AND NOMINATIONS

Screening of complete applications will begin immediately and continue until the completion of the search process. Inquiries, nominations, referrals, and CVs with cover letters should be sent via the Isaacson, Miller website below. Electronic submission of materials is strongly encouraged.

<https://www.imsearch.com/open-searches/uc-irvine/executive-director-planned-giving>

Rachel Ellenport, Partner  
Nicole Poe, Managing Associate  
Megan Gorman, Managing Search Coordinator

*The University of California, Irvine 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.*

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## ADDENDUM I: LEADERSHIP

### **Brian T. Hervey, Vice Chancellor, University Advancement and Alumni Relations**

Brian T. Hervey serves as the Vice Chancellor for University Advancement and Alumni Relations and the President of the UC Irvine Foundation at the University of California, Irvine. He provides leadership over all aspects of the university's fundraising programs, alumni relations, and development initiatives. Before his appointment as Vice Chancellor, Brian served as Associate Vice Chancellor for UCI Health Advancement.

Prior to joining UC Irvine, Brian led successful multi-million dollar fundraising campaigns at Scott & White Healthcare Foundation as its Vice President for Philanthropy and Communications. In this role, he supervised staff in the areas of major gift development, communications, and planned giving for the Baylor Scott & White Health Central Division, which included 14 hospitals and over 65 clinics in central Texas. Brian previously held various leadership positions at the Texas A&M Foundation and Texas A&M University System.

Brian is a Certified Fundraising Executive (CFRE) and a Certified Gift Planning Professional (CGPP). Additionally, he served as the chair for development on the institutional advancement steering committee for the Association of American Medical Colleges (AAMC), and has presented at conferences on advancement topics for the AAMC, Association for Healthcare Philanthropy (AHP), and Council for Advancement and Support of Higher Education (CASE). Brian serves on the boards of the Orange County Business Council and the Pacific Symphony. He graduated from Texas A&M University.

### **Roland Ho, Associate Vice Chancellor for Strategic Philanthropy**

As Associate Vice Chancellor for Strategic Philanthropy, Roland Ho leads a dedicated team in key areas of University Advancement and Alumni Relations, including planned giving, national constituent engagement, university initiatives, and scholarship and chancellor's programs. Roland's primary focus is to build a collaborative culture of philanthropy. He and his team nurture relationships with supporters to ensure that their philanthropic aspirations align with UC Irvine's strategic priorities – something Roland has been doing effectively for years.

Roland has achieved significant success during his career. He has managed large portfolios of major and principal gift donors, routinely exceeding his goals. With a background in planned giving, Roland has long believed that careful planning is important for all gifts. Thanks to his collaborative approach and strategic foresight, he has helped countless families provide over \$893 million in planned and deferred support to higher education.

Prior to joining UC Irvine, Roland worked at the Orange County Community Foundation for a decade. There, he assisted Orange County's philanthropic families achieve their philanthropic impact through scholarships and grants and also empowered local nonprofits with planned giving tools to support their



donors. Roland holds a bachelor's degree in philosophy from UC Irvine and is a certified specialist in planned giving.

## ADDENDUM II: THE UNIVERSITY OF CALIFORNIA, IRVINE

Since 1965, the University of California, Irvine has combined the strengths of a major research university with the bounty of an incomparable Southern California location. UC Irvine's unyielding commitment to rigorous academics, cutting-edge research, and distinguished leadership makes the campus a driving force for innovation and discovery that serves the local, national, and global communities in many ways. Founded as an interdisciplinary campus, UC Irvine boasts excellence across its arts and sciences core and in its professional schools. Since 2015, UC Irvine has been recognized by *The New York Times* for its impact in upward mobility for low-income and first-generation students, ranking 9<sup>th</sup> among best public universities in the country by *U.S. News & World Report*, marking the 10<sup>th</sup> consecutive year UC Irvine has been ranked in the top 10 public universities.

A proud member of the Association of American Universities (AAU), UC Irvine embodies both the strengths of a major research institution and the dynamism and nimbleness of an emergent campus. With an annual operating budget of \$6.7 billion and an endowment of more than \$1.04 billion, the university includes 16 schools, including one of the top 50 medical schools and one of the top 25 law schools in the nation. The UC Irvine faculty has included three Nobel laureates, recipients of the National Medal of Science, a National Humanities medalist, and many members of the most important scholarly, scientific, and professional organizations. In Fiscal Year 2023-24, UC Irvine received the most research funding in campus history, amount to \$668 million in grants and contracts. The university has an annual economic impact on Orange County of \$7 billion —\$8 billion statewide— and is the region's second-largest contributor for a talent-rich workforce.

UC Irvine experienced significant growth over the last decade and launched 20 new graduate programs in fields such as pharmaceutical sciences, data analytics, public health, and nursing science; established a school of education; opened the first new public law school in California in more than 40 years; and, with the historic \$200 million naming gift from Susan and Henry Samueli, created the first-of-its-kind College of Health Sciences focused on interdisciplinary integrative health. The Samuelis continue their service to UC Irvine Health as honorary chairs of the *Brilliant Futures* campaign. The campus has also added nearly five million square feet of new space, including the 500,000-square-foot UC Irvine Douglas Hospital and the 275,000-square-foot student center, as part of a \$1.8 billion effort to build out the remainder of the university's land grant. Additionally, UC Irvine plans to build a world-class, acute care hospital on the Irvine campus by 2025, broadening access to the most advanced healthcare services.

With more than 36,580 undergraduate and graduate students, more than 1,560 regular rank faculty, and 13,000 staff members, UC Irvine is among the fastest-growing campuses in the University of California system. Increasingly a first-choice campus for students, nearly 122,700 prospective students applied for first-year admission for Fall 2024, with 28.8 percent being admitted. Approximately 88 languages are spoken, and 79 countries represented within UC Irvine's student body. UC Irvine is committed to excellence through diversity and strives to enroll academically talented students who are representative of the population, including those traditionally underrepresented in various academic fields. The

university is designated as a Hispanic-serving Institution and an Asian American and Native American Pacific Islander-serving Institution, ranking first choice for first-generation, in-state students among all UC campuses for Asian American and second choice for African American and Chicanx/Latinx students. During the 2024-25 academic year, about 75 percent of UC Irvine undergraduates received financial aid and nearly 38 percent of UC Irvine enrollees received Pell Grants.

To learn more about UC Irvine, visit: [www.uci.edu](http://www.uci.edu).