



Assistant Director for Gift Documentation & Endowment Stewardship

Purpose

The Assistant Director for Gift Documentation and Endowment Stewardship is an essential contributor to the development and implementation of a comprehensive program to steward annual and endowment gifts to the University of Missouri-Kansas City.

The assistant director (AD) serves as the primary point of contact for gift accountability, gift compliance and document retention to sustain the confidence donors experience and associate with the university. Their approach to this position and donor service is firmly grounded in the assurances, respect and trust declared by the Donor Bill of Rights. The responsibilities the AD will manage to be most effective includes routine reviews of gift agreements and gift-related documents, endowment fund tracking and reporting, and communication assessment for the appropriate stewardship response.

Organizational Relationships

The Assistant Director for Gift Documentation and Endowment Stewardship reports to the Director of Stewardship Support Services within the Division of Advancement and the UMKC Foundation. The position works closely with the staff of the division, including major gift officers, and the UMKC Financial Aid and Scholarships office and other university partners to ensure that all new and existing fund agreements and pledges match the university's use of funds as defined by the gift purpose.

Essential Duties:

Gift Documentation

1. Ensures documentation of new endowment agreements, multi-year current-use fund agreements, pledge forms, bequests and amendments of previously established funds are accessible in the donor database per gift allocation and AcademicWorks for scholarship funds.
2. Oversees compliance of gift agreement policy for current-use funds, endowments, and pledge commitments
3. Reviews endowment, gift, and pledge agreements in coordination with major gift officers ensuring documented purpose and terms have appropriate stewardship communications defined, documented and scheduled in the donor database.

4. Acts as the primary contact for internal inquiries about compliance and accountability issues for new and previously established gift-related agreements, including endowments and pledges.
5. Uses the donor database to audit and update endowment donor information and performs ad hoc queries, including pledge and bequest fulfillment, to prompt timely stewardship communications and donor engagement planning.

Fund Tracking & Compliance

1. Develops and manages a tracking process for scholarship fund use of endowments and current-use funds in partnership with the UMKC Financial Aid and Scholarships office; identifies timeline for scholarship funds to be available for application in AcademicWorks.
2. Develops and manages a tracking process for non-scholarship fund use, including program, lectureship, fellowship, chair and professorship, of endowments and current-use funds; seeks support from major gift officers and university staff when necessary.
3. Identifies endowed funds with and without funds available in the distribution account with the Director of Finance annually; information will aid in tracking process and reporting.
4. Coordinates with Director of Operations to identify completed and amended gift agreements for new and previously executed funds; coordinates to ensure a complete list of endowed funds exists in one place to be managed and referenced for reporting.
5. Applies gift stewardship process following the approval of gift agreement; collaboration with MGO will be necessary.
6. Seeks to enhance current stewardship processes related to gift compliance and seeks to implement new technology or vendors for added efficiency; processes are documented.

Reporting

1. Collaborates with the Stewardship team, key members of the division, and other university departments to prepare the annual Endowment Fund report for distribution to endowment fund donors; the AD is project lead.
2. Creates process for new endowments to receive introduction to the annual Endowment Fund report as part of the communication plan of the stewardship program.
3. Collaborates with the Director of Stewardship on a reporting process and supporting materials for current-use funds to add to the stewardship program; seeks support from the UMKC Financial Aid and Scholarships office; current-use funds minimum amount of \$5,000.

4. Provides verbal or written communication to the division staff on scholarship fund establishment and distribution policy or process updates to assist major gift officers and alumni relation officers with managing donor expectations for endowed or current-use funds.
5. Seeks to enhance current stewardship processes related to reporting and seeks to implement new technology or vendors for added efficiency; processes are documented.

Requirements

- Your capacity for details and accuracy can be relied upon for queries, reports, documentation, tracking processes and other assigned duties.
- You are comfortable navigating data, have strong computer skills, including proficiency with the Microsoft Office for correspondence, special reports, spreadsheets, databases, forms, etc.
- You have an ability to clearly communicate compliance policies, issues and concepts to the division staff, donors and other campus partners as a representative of UMKC and the UMKC Foundation.
- You have strong writing and proofreading skills.
- You accept cross-functional responsibilities (i.e., monitoring the general mailbox and incoming calls) for the division with paid time-off absences, as needed.
- You are available to work evening and weekends for donor appreciation events.

Key Competencies

- **Effective communications:** Expresses oneself clearly and empathetically in interactions with others in all forms of communication (i.e., verbal and written, one-on-one and group, etc.)
- **Interpersonal Awareness:** Builds and maintains positive relationships and actively contributes as a member of working teams to achieve results through collaboration.
- **Professional Credibility:** Takes responsibility for meeting goals, objectives, obligations, and solving problems while representing the mission, vision and values of the organization.
Critical Thinking: Obtains, analyzes and evaluates information effectively in the face of ambiguity. Makes appropriate decisions based on relevant information and experience.
- **Ethics and Trust:** Models and upholds the values of candor, openness, inclusiveness and honesty despite internal and external pressures; acts consistently with UMKC ethical guidelines and organizational core values and beliefs. Additionally, adheres to the ADRP Ethics Statement and the Donor Bill of Rights.
- **Valuing Diversity & Inclusiveness:** Respects, values and contributes to the UMKC's commitment to inclusiveness and diversity.

Education And Experience

- The Assistant Director for Gift Documentation and Endowment Stewardship is not an entry-level position.
- You have a bachelor's degree or equivalent qualification and a minimum of 3 years of professional experience – a total of 7 years combined. Preference in fundraising, communications, donor relations or a comparable role with transferable skills including project management, writing, and/or data analysis.
- You have experience with fundraising databases or other non-profit donor databases.
- You have familiarity with higher education institutions and working in a complex organizational environment.
- You have knowledge of document management principles and experience with project management software (i.e., Smartsheet.)

Salary Range: \$58,000 to \$68,000 commensurate with experience

UMKC Foundation

The UMKC Foundation is a separate but affiliated enterprise that is devoted to raising funds for the University of Missouri-Kansas City, and for exercising fiduciary responsibility over endowments and other philanthropic investments made to UMKC.

University of Missouri – Kansas City

UMKC is the largest comprehensive, fully accredited university in the Kansas City area with award-winning academic programs and a diverse, inclusive campus; it is one of four university members of the University of Missouri System. Through its 4-pillar strategic plan, UMKC seeks to 1) provide exceptional student learning, success and experience, 2) become a thriving discovery enterprise, 3) transform our community and region with impactful engagement, and 4) foster an environment of invigorating multi-culturalism, globalism, diversity and inclusion.

If you are interested in helping grow the culture of philanthropy that supports UMKC, please send your cover letter and resume to: contact@umkcfoundation.org

Equal Opportunity Employer

The UMKC Foundation is an equal opportunity employer. Equal Opportunity is and shall be provided for all employees and applicants for employment on the basis of their demonstrated ability and competence without unlawful discrimination on the basis of their race, color, national origin, ancestry, religion, sex, pregnancy, sexual orientation, gender identity, gender expression, age, disability, protected veteran status, or any other status protected by applicable state or federal law. This policy shall not be interpreted in such a manner as to violate the legal rights of religious organizations or the recruiting rights of

military organizations associated with the Armed Forces or the Department of Homeland Security of the United States of America.

Reasonable accommodations may be made to enable individuals with disabilities to perform the duties and functions of this job. If you believe you may have difficulty performing any of the duties or functions of this job, please contact the Office of Affirmative Action at (816) 235-1323.

Know Your Rights

To read more about Equal Employment Opportunity (EEO) please use the following links:

- Know Your Rights [English Version](#)
- Know Your Rights [Spanish Version](#)

UMKC Foundation Statement on Diversity

We value the uniqueness of every individual and strive to ensure each person's success. Contributions from individuals with diverse backgrounds, experiences and perspectives promote intellectual pluralism and enable us to achieve the excellence that we seek in learning, research and engagement. This commitment makes our university a better place to work, learn and innovate.

In your application materials, please discuss your experiences and expertise that support these values and enrich our missions of teaching, research and engagement.