



Senior Director of Gift Planning
Gonzaga University
Spokane, Washington
gonzaga.edu

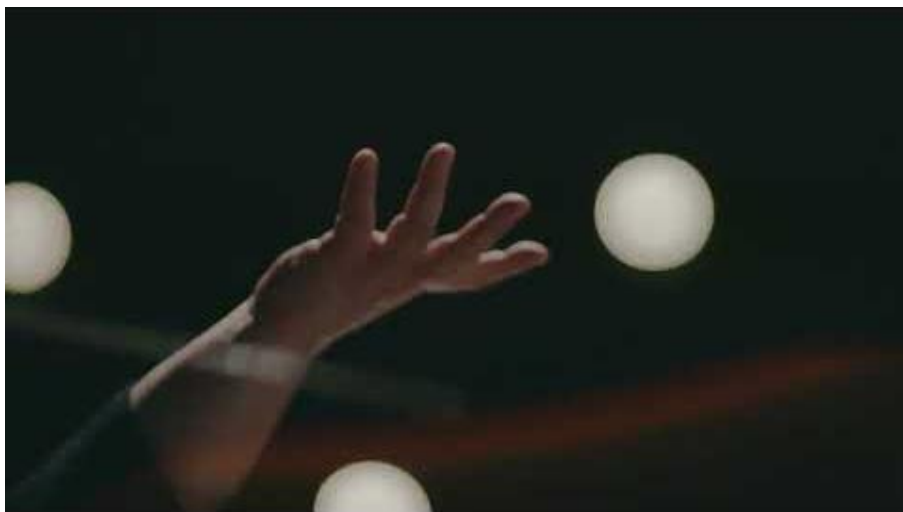
Send Nominations or Cover Letter and Resume to:

Chandra Montgomery
Consultant
323-473-9808
cmontgomery@lindauerglobal.com

Alexandra Barber
Consultant
904-412-8705
abarber@lindauerglobal.com

The Opportunity:

Founded in 1887, Gonzaga University is a private liberal arts college committed to the education of the whole person in mind, body, and spirit. The institution embraces its unique identity as an exemplary university rooted in a Jesuit, Catholic, humanistic tradition. Located in Spokane, Washington, the historic 131-acre campus showcases the beauty of eastern Washington — a jaw-dropping landscape of rivers, lakes, mountains, and desert, with four beautiful seasons.



Video: Gonzaga University - Hands

Generosity from Gonzaga alumni, parents, faculty, staff, friends, and fans help keep the University's mission alive. In 2015, the University launched the [*Gonzaga Will: The Campaign for Our Future*](#), its most ambitious to date, closing in the fall of 2018 with a total of more than \$355 million. A testament to the deep and unwavering commitment of Gonzaga's donors, the campaign exceeded the \$250 million goal by an astounding 42%.

As the University looks to the future, Gonzaga seeks a Senior Director of Gift Planning to build on the momentum of the last campaign. Planned giving will play a significant role in the University's fundraising success as it embarks on another comprehensive campaign, and the Senior Director will provide strategic vision for this key growth area. Reporting to the Assistant Vice President of Major and Planned Giving and Academic Development, the Senior Director of Gift Planning will have the opportunity to elevate an already growing program that reflects industry best practices for complex and deferred gifts. The position will lead and mobilize a talented staff and be sought after as the primary partner on planned gifts both within the division and across campus.



Gonzaga University

At Gonzaga, our comprehensive educational programs focus on developing the whole person: mind, body, and spirit. So our students become people of curiosity, courage, and conviction.

PEOPLE OF PURPOSE.

That's part of our Jesuit heritage: helping students discover their God-given calling and go after it with everything they've got.

What students learn at Gonzaga will take them beyond the classroom and into the world. Beyond the status quo and into a future filled with creativity and optimism.



And all the while, students are surrounded by a community of people cheering them on and pushing them to be their best.

Because when students find their purpose at Gonzaga, they also find that they can use that purpose to shape the world for the better — for all of us.

Facts & Figures: [Gonzaga at a Glance](#)

As the [79th-ranked national university](#) in the country, Gonzaga is on the rise. With 1,200 employees, Gonzaga has become one of the most preferred places to work in the Inland Northwest. In addition to the tremendous employee and student experience, the academic profile of the institution is strong. Included in the University's academic programs are the [UW-GU Regional Health Partnership](#) for medical education, [School of Nursing and Human Physiology](#), the [School of Leadership Studies](#), the [School of Engineering and Applied Science](#), the [College of Arts and Sciences](#), the [School of Business Administration](#), the [School of Education](#), the [School of Law](#), [Gonzaga In Florence](#), and the [Foley Library](#).

Mission Statement

Gonzaga University is an exemplary learning community that educates students for lives of leadership and service for the common good.

In keeping with its Catholic, Jesuit, and humanistic heritage and identity, Gonzaga models and expects excellence in academic and professional pursuits and intentionally develops the whole person — intellectually, spiritually, culturally, physically, and emotionally.

Through engagement with knowledge, wisdom, and questions informed by classical and contemporary perspectives, Gonzaga cultivates in its students the capacities and dispositions for reflective and critical thought, lifelong learning, spiritual growth, ethical discernment, creativity, and innovation.

The Gonzaga experience fosters a mature commitment to dignity of the human person, social justice, diversity, intercultural competence, global engagement, solidarity with the poor and vulnerable, and care for the planet. Grateful to God, the Gonzaga community carries out this mission with responsible stewardship of our physical, financial, and human resources.

In addition to Gonzaga's signature campus in Florence, Italy, students are able to avail themselves of 50 [study-abroad](#) programs throughout the world, including Europe, Africa, Latin America, Asia, Oceania, and the Middle East.



Gonzaga also has a pretty good basketball program.



Senior Director of Gift Planning

Reporting to the Assistant Vice President of Major and Planned Giving and Academic Development, the Senior Director of Gift Planning provides strategic and managerial leadership for all gift planning needs within and for University Advancement and greater Gonzaga University. The Senior Director of Gift Planning organizes and implements a program to increase and steward planned and deferred gifts for Gonzaga University that reflects industry best practices and maximizes charitable contributions through planned giving vehicles. The position provides leadership and strategic direction while managing the day-to-day operation of the University's planned giving program. As a leader within University Advancement's development team, the Senior Director of Gift Planning will further develop the planned giving consultancy model for all individual fundraisers while managing an individual portfolio of donors. Additionally, the position will lead and mobilize a talented staff in meeting University Advancement goals and objectives.

Administration of Planned Giving Efforts and Donor Engagement (60%)

- Provides strategic oversight of a comprehensive Planned Giving operating and marketing plan in coordination with the overall goals of University Advancement (UA).
- Serves as the department leader with the responsibility of developing, organizing, and marketing a planned giving program that promotes long-term support of the University through planned and deferred giving utilizing vehicles: bequests, beneficiary designations, charitable gift annuities, charitable trusts (annuity-remainder-lead), and real estate and life insurance gifts.
- Implements a strategic approach to planned giving including strategies for cultivating, soliciting, acknowledging, and stewarding donors.
- Collaborates with the Vice President for Advancement and the Assistant Vice President, Major and Planned Giving, to grow the planned giving program in order to increase revenue to support the strategic direction of the University.

- Directs and oversees closure and ongoing maintenance of planned gift arrangements and probate through the benefactor's advisors, including attorney's, financial trust departments, and accountants; the University's Controller, Vice President of Finance, General Counsel, and Vice President of UA.
- Maintains relationships with a select portfolio of key donors by conducting solicitation/stewardship meetings, responding to inquiries, and motivating current and prospective donors committed to legacy gifts.
- Works with donors on various aspects of planned giving including charitable remainder trusts, charitable gift annuities, and gifts of unusual or complicated assets.
- Provides leadership and expertise, both procedural and technical, to gift officers in all aspects of planned gifts to include guiding them through the gift illustration, proposal, and closure process.
- Provides strategic oversight of planned giving information/data and preparation of timely and accurate reports (Progress Report, MERPT, PG/HS Excel Spreadsheet, marketing response reports, CRM) to provide critical analysis to the UA teams.
- Works in partnership with finance to manage the life insurance gift program and conducts annual policy reviews with recommendations to the Vice President of Finance regarding policy viability.
- Oversees life-income gift activity as the liaison with the administrator (i.e., US Bank) and the University's life-income administrator and controller's office in coordination with state charitable gift annuity administration and higher-level reporting.
- Represents the Planned Giving office and its goals in external contacts — social events, meetings, special events, and benefactor calls.
- Stewards the business relationship with the Finance Office, Controllers Office and General Counsel to ensure gift planning needs are being met.

Supervision Responsibilities (30%)

- Meets regularly, at least once a month, with all direct reports.
- Manages performance and departmental goal setting on an ongoing basis throughout the year.
- Ensures effective performance management for direct and indirect reports.
- Creates and ensures opportunities for team development through multiple mechanisms and ensures recognition efforts that build morale.
- Stewards all resources, including budget, effectively and appropriately.
- Meets operational targets, develops innovative solutions, and continuously improves department and operational efforts.
- Supports and contributes to hiring efforts that meet our operational and mission needs. Develops and supports inclusive environments.
- Ensures all staff are effectively onboarded to their roles.
- Actively builds relationships and demonstrates bias for collaboration.
- Addresses and resolves conflicts.
- Communicates regularly with all team members through multiple mechanisms.

Other Functions (10%)

Attends University Advancement events as needed in support of the division's overall mission. Performs related duties as assigned by the Assistant Vice President for Major and Planned Giving or Vice President of Advancement in support of Gonzaga University's mission. Participates in Office of Advancement staff meetings, trainings, and other collaborative opportunities.

+++++

Commitment to Diversity

In a world that grows increasingly interconnected, there is a need to understand and embrace different cultures and traditions. Diversity enriches the student body and the legal profession. It defines our American society and strengthens our nation.

Diversity affirms our mission-centered commitment to an inclusive community where human differences thrive within a campus community of equality, solidarity, and common human nature. We seek to nourish difference in an environment characterized by mutual respect and the sustainable creation of a campus climate that attracts and retains community members from diverse backgrounds. In this context, age, gender, ethnicity, disability, social class, religion, culture, sexual orientation, language, and other human differences all contribute to the richness of our academic community life.

Our Commitment

The Gonzaga community is committed to the intellectual development of all students. It is grounded in the context of our mission to promote faith, service, ethics, leadership, and justice and is reflected in the fullness of our community.

The mission is fulfilled in a number of tangible ways through the [Office of Diversity, Equity, and Inclusion](#), led by Dr. Robin Kelley. At Gonzaga, we nurture the dignity of all people to create an inclusive and increasingly multicultural academic community. This commitment to diversity is part of who we are as a University, and it reflects our deeply rooted Jesuit and Catholic ideals of social justice and service.

To create a diverse and inclusive community, we encourage dialogue, intellectual exchange, and solidarity. We work to create a learning environment that promotes cultural engagement, enriches mindfulness, fosters a sense of belonging, and challenges systems of privilege and oppression.

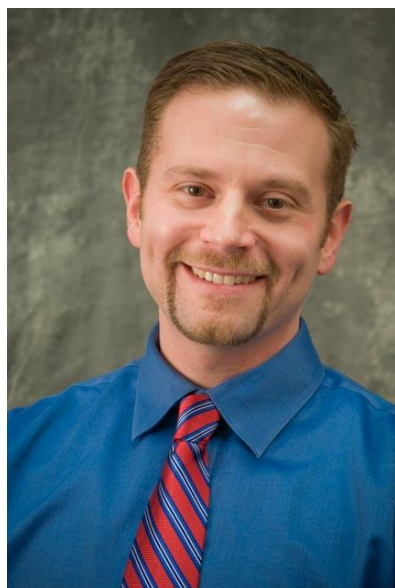
Equal Opportunity Policy

Gonzaga is an equal opportunity, affirmative action university.

The University does not discriminate against any person on the basis of race, religion, sex, national origin, age, marital or veteran status, sexual orientation, a physical or mental impairment that substantially limits a major life activity, or any other non-merit factor in employment, educational programs, or activities that it operates.

All University policies, practices, and procedures are consistent with Gonzaga's Catholic, Jesuit identity and mission statement and comply with federal and state regulations, including Sections 503 and 504 of the Rehabilitation Act of 1973.

University Advancement Leadership



Joe Poss

Vice President for University Advancement

Joe Poss was appointed to this leadership role in October 2011. He oversees the University's Development, Alumni Relations, and Donor Relations operations. He earned a Bachelor's degree in Criminal Justice from Gonzaga University in 1997 and joined University Advancement in 1998. He served in several positions during his 24 years as a member of the University Advancement team.

Under his leadership, Gonzaga University closed the most ambitious fundraising campaign in its history, *Gonzaga Will: The Campaign for Gonzaga University*. With an initial goal of \$250 million, Gonzaga donors met and surpassed this benchmark, raising over \$355 million to make Gonzaga accessible to all students who wish to study here, fund academic innovation, foster expanded global engagement, build community and address facility needs.

Numerous projects were supported through the campaign. The John J. Hemmingson Center was completed in fall 2015 and has become a gathering place and source of inspiration for the entire community. In 2017 the Della Strada Jesuit Residence was completed, provided a new home for Gonzaga's Jesuit Community. Most recently, the Myrtle Woldson Performing Arts Center marked a milestone of performing arts education at Gonzaga and brings Inland Northwest audiences together to share in live performances. The John and Joan Bollier Family Center for Integrated Science and Engineering opened in the spring of 2022. The 82,000-square-foot facility takes STEM education to a new level of engagement and real-world preparation and creates an opportunity for engineering and applied and natural sciences to live and grow together.



Dori Sonntag, MA, CPC

Associate Vice President and Chief Operating Officer for Advancement

Dori Sonntag oversees the strategic planning, operations, system enhancement, and talent management. She has been with Gonzaga for 24 years, serving in a variety of roles within Advancement, including a leadership role in two successful, comprehensive campaigns for Gonzaga that together raised over \$500 million. Sonntag earned her Bachelor's degree in psychology and Master of Arts in counseling psychology, both from Gonzaga University, and she is also a certified leadership coach.



Jeff Geldien, Ph.D.

Assistant Vice President, Academic Development and Major & Planned Gifts

Jeff Geldien oversees the major and planned gifts team for the division of University Advancement at Gonzaga. He works collaboratively with all academic deans, athletics, and the Office of the Provost to drive resources to support Gonzaga's strategic plan and University priorities through major and planned giving vehicles. As Assistant Vice President, Geldien has helped expand the relationship between advancement and academic leadership in which deans are able to more effectively work with gift officers and University Advancement.

A 14-year veteran in higher education leadership, Geldien joined Gonzaga University in 2008. Prior to being appointed as Assistant Vice President in 2018, he most recently served as Assistant Dean of External Relations for the School of Law at Gonzaga where he oversaw all development, alumni relations, marketing, communications, and campaign efforts for the unit. In addition to his development duties, Geldien has spent the past 14 years serving on various University committees, which has allowed him to develop a deep understanding of the higher education enterprise as well as higher education philanthropy.

Geldien holds a Bachelor's degree from the University of Wyoming and a Master's and doctorate in leadership studies from Gonzaga University. He is also a 2022 graduate of the American Academic Leadership Institute's (AALI) Senior Leadership Academy.

Spokane, Washington

When it comes to university campuses, Gonzaga's has a pretty special mix that's hard to find anywhere else. Its campus includes handsome classic brick buildings and brand new, state-of-the-art facilities.

Gonzaga is located in [Spokane](#), a city that *National Geographic Traveler* magazine named one of the "[Best Cities in the United States](#)." It's a city that is large enough to have plenty going on year-round and yet small enough to be friendly, livable, and easy to explore. Eastern Washington and the nearby Idaho panhandle region boast a jaw-dropping landscape of rivers, lakes, mountains, and desert, with four beautiful seasons. It is on the "sunny side" of the state, with far less rain than western Washington.



What makes its campus unique, however, are the people who populate and surround it. Gonzaga serves as a hub for students and professors, friends and fans, international scholars and local neighbors who come together to learn from, support, and worship with one another.

Whether they're studying or working in the new [Bollier Family Center](#) for Integrated Science and Engineering, cheering on the basketball teams at the 6,000-seat [McCarthy Athletic Center](#), celebrating mass at [St. Aloysius Church](#), checking out the latest exhibit at the [Jundt Art Museum](#), enjoying a performance at the new [Woldson Center for Performing Arts](#), or grabbing a burger at the [Hemmingson Student Center](#), the Gonzaga community makes this place feel like home — like a family. And in this family, there's always room for one more: you.

Click [here](#) to learn why people are Googling “Where is Gonzaga located?”



Procedure for Candidacy

Lindauer, a global search and talent firm, has been retained to conduct this search on behalf of Gonzaga University. Consideration of candidates will continue until the position is filled.

Candidates should submit, in confidence, a resume and cover letter. Communications, nominations, applications, and inquiries concerning this search should be directed to **Chandra Montgomery, Consultant** at cmontgomery@lindauerglobal.com or **Alexandra Barber, Consultant** at abarber@lindauerglobal.com.

Prior to submitting your resume for this position, please read it over for accuracy. Lindauer does verify academic credentials for its candidates, and our clients frequently conduct background checks prior to finalizing an offer.