



EXECUTIVE DIRECTOR FOR PLANNED GIVING
UNIVERSITY OF TEXAS AT EL PASO
HYBRID – EL PASO, TEXAS



Aspen Leadership Group is proud to partner with the University of Texas at El Paso in the search for an Executive Director for Planned Giving.

The Executive Director for Planned Giving will be an experienced, strategic partner with a track record of success. As the University of Texas at El Paso (UTEP) builds out its Development team, it is seeking a highly collaborative partner to take ownership over all parts of a long-term planned giving strategy for the university.

The Executive Director for Planned Giving will manage a portfolio of major (\$25,000+) and principal-level (\$1,000,000+) planned giving prospects regionally and nationally, and develop and execute strategies leading to successful evaluation, cultivation, solicitation, and investment that leverages the interests of UTEP donors with campus-wide initiatives and opportunities. Working closely with campus partners, schools and colleges, and the unit-based Development team, the Executive Director for Planned Giving will guide the identification and prioritization of fundraising opportunities, focusing on planned gifts such as bequest intentions, life income plans, retirement plan gifts, donor-advised funds, gifts of real estate and other appreciated assets, as well as more complex gifts like charitable remainder trusts.

Serving as a planned giving advisor for the division, the Executive Director for Planned Giving will collaborate with and assist the Development team with the preparation, explanation, and solicitation of planned and blended gift solicitations. The Executive Director for Planned Giving is also responsible for developing donor-centered proposals that involve assets. As a subject matter expert in estate planning and legacy giving, the Executive Director for Planned Giving will develop and maintain current information on relevant tax, trust, and financial and estate planning processes.

Additionally, in partnership with Institutional Advancement's Marketing and Communications team, the University's Marketing and Communications team, and other school and college communications teams, the Executive Director for Planned Giving will advise and collaborate on a targeted marketing and communication strategy that raises donor awareness of the importance and benefits of planned giving.

The University of Texas at El Paso is America's leading Hispanic-serving university, with a student body that is 84% Hispanic. It enrolls more than 24,000 students in 169 bachelor's, master's, and doctoral programs in 10 colleges and schools. With more than \$109 million in total annual research expenditures, UTEP is an R1 research university, a designation given to the top 5% of colleges and universities nationally and is ranked sixth in Texas for federal research expenditures at public universities.

UTEP maintains one of the lowest out-of-pocket costs of any doctoral research university in the United States and is one of the only institutions to receive both a top research designation and a Community Engagement Classification from the Carnegie Foundation.

Set against the backdrop of the Franklin Mountains in the Chihuahuan Desert, UTEP is located at the heart of the U.S.–Mexico border in one of the largest binational communities in the world. UTEP’s award-winning, sustainably designed campus landscape and unique Bhutanese architecture create an energizing and tranquil oasis in the bustling El Paso–Juárez metroplex. Whether students live on campus or in the community, opportunities abound to become involved with student organizations, research, community service, internships, study abroad, student employment, Division I athletics, and dozens of cultural and entertainment activities. UTEP has a global reach that includes 80 international agreements with institutions throughout the world, including 23 with Mexico, and boasts more than 133,000 alumni living in 76 countries.

UTEP is a comprehensive public research university that is increasing access to excellent higher education. The university advances discovery of public value and positively impacts the health, culture, education, and economy of the community it serves.

UTEP was ranked number one in the U.S. for its success in achieving both competitive research and student social mobility. It is also one of the only top tier research universities in the country with a majority Hispanic student population. UTEP has one of the lowest out-of-pocket costs of all U.S. research institutions and has been recognized as a leader in social mobility for helping graduates move from family incomes in the bottom 20% to the top 20%.

INSTITUTIONAL ADVANCEMENT AT THE UNIVERSITY OF TEXAS AT EL PASO

Institutional Advancement (IA) at the University of Texas at El Paso is committed to advancing the university and transforming generations. The IA team works cohesively to build strategic relationships, engage alumni and friends with the university, and match philanthropic goals with institutional priorities to advance, support, and sustain the university’s mission.

The division relies on the constant collaboration of its departments—Strategy & Engagement, Advancement Services, and Development. With a growing team and vastly unrealized fundraising potential, IA has had three record-breaking years in a row and is poised for continued growth and success. With a commitment to building the team the right way for the long term and implementing innovative ways to extend its reach and impact, it is an exciting time to join UTEP IA.

As America’s leading Hispanic-serving university, the University of Texas at El Paso is dedicated to increasing access to excellent higher education and positively impacting the community it serves. In Institutional Advancement, it is understood that its success is built on the contributions of a diverse team in its people, thoughts, and experiences. Its culture of care and inclusive excellence is more than a commitment at UTEP IA—it is the foundation of all it does.

REPORTING RELATIONSHIPS

The Executive Director for Planned Giving will report to Lori Cook, the Associate Vice President for Development.

FROM THE VICE PRESIDENT

Now is a great time to join UTEP Institutional Advancement! President Heather Wilson is committed to building our Advancement shop the right way and for the long term. While some institutions prioritize the quick wins and scoreboard numbers above institutional infrastructure and pipeline development, we have been able to invest strategically throughout our entire division to set us up for sustainable growth. In addition, our organizational culture is something special. I would argue that there isn't another Advancement shop that is more committed to one another or our institution than the team we have at UTEP. We care deeply about one another as humans first. At the end of the day, we are all trying to serve our team, institution, and this community as best as we can. This allows us to challenge each other directly, have hard conversations, and come out even stronger and closer than ever. If this sounds like an organizational culture you'd thrive in, I'd encourage you to apply!

—Jake Logan, Vice President for Institutional Advancement

FROM THE ASSOCIATE VICE PRESIDENT

The Development team at UTEP is unlike any other. Our approach to development prioritizes collaboration, support, and excellence while engaging donors in meaningful ways. We work hard, but also actively support one another inside and outside of the office. A commitment to collaborative fundraising coupled with significant unrealized potential means that this role is particularly poised for success. Our unit-based development officers are eager to have this centrally based role as a colleague and teammate, and we are excited to add an individual with planned giving expertise as a leader to our team. Lastly, UTEP is the quintessential example of what higher education is here for—access, opportunity, and social mobility—and the impact it can have on a student's life and the generations to come. If this sounds intriguing to you, we'd love to have you apply and start a conversation!

—Lori Cook, Associate Vice President for Development

PRIMARY RESPONSIBILITIES

The Executive Director for Planned Giving will

- implement a comprehensive and innovative planned giving strategy;
- develop and track clear and strategic KPIs and metrics that help to drive UTEP toward its broader goals;
- collaborate with development officers on planned giving proposals;
- partner with the Assistant Vice President for Advancement Communications to elevate planned giving marketing into Institutional Advancement's and university-wide communications;
- invest time and energy in growing the Development team in their gift planning knowledge and techniques; and
- provide direct feedback to all members of the organization, and positively contribute to a team culture that relentlessly pursues excellence while also showing empathy for the human behind the job.

LEADERSHIP

Jake Logan

Vice President for Institutional Advancement

Jake Logan's role as Vice President for Institutional Advancement began May 18, 2020. Jake came to UTEP from Ball State University, where he served as Vice President for Advancement and President of the Ball State University Foundation. During his career in academic advancement, he has been part of comprehensive capital campaigns exceeding \$1 billion at three large, public institutions—the University of Florida, the University of Oregon, and the University of Missouri.

Jake earned his undergraduate degree in public relations at the University of Florida and received a Master of Nonprofit Management at the University of Oregon. He began his career in nonprofit fundraising for the American Heart Association, where he ultimately became Vice President of Field Operations.

Lori Cook

Associate Vice President for Development

Lori Cook arrived at UTEP in March 2023, with 10 years of experience in development and relationship building roles. Lori's role oversees comprehensive fundraising efforts on behalf of the university, spanning all aspects of philanthropic investments. Her team is comprised of major giving, principal gifts, corporation and foundation relations, planned giving, leadership annual giving, and donor engagement. The goal of Development at UTEP is to match the philanthropic priorities of each donor with meaningful investment opportunities within the University, creating a positive return on philanthropic investment for each gift it receives.

Prior to joining UTEP, Lori served as the Associate Vice President of Collegiate Development at Utah State University where she oversaw one of the highest performing fundraising teams in the nation and led a record-breaking fundraising year of over \$109 million. She also oversaw the launch of the Aggie Impact Campaign, an innovative comprehensive campaign model in higher education. Lori was promoted to Associate Vice President after serving as the Senior Director of Development in the College of Science at Utah State University for two years.

Lori has also been a collegiate development director at University of Louisiana at Lafayette and a regional major gift officer for Tulane University. Before she started her higher education career, Lori worked in corporate and foundation relations for a nonprofit and marketing for a gaming corporation.

Lori received a double bachelor's degree from Southwestern University in Georgetown, Texas in Communications Studies and English, with a minor in Philosophy. Her passion for supporting higher education stems from being a first-generation college student from a rural south Texas community and experiencing the difference a degree can make on an individual's life.

PREFERRED COMPETENCIES AND QUALIFICATIONS

The University of Texas at El Paso seeks an Executive Director for Planned Giving with

- a commitment to the mission of the University of Texas at El Paso—to make exceptional, affordable education accessible to anyone with the ambition to learn and the drive to succeed;
- dedication to consistently demonstrating a commitment to upholding the highest standards of integrity and exercising sound professional judgment;
- an ability to ensure the confidentiality and privacy of donor-related details, financial transactions, and strategic plans, reflecting the utmost respect for the trust placed in UTEP's development efforts;
- experience working with major gift officers to develop donor strategies for blended gifts;
- experience using a fundraising database (IA uses Raiser's Edge/NXT);

- a commitment to collaboration and an ability to influence an organization through consensus-building and trust;
- tenacious optimism and a goal-oriented, growth mindset;
- an ability to remain flexible and develop creative solutions in pursuit of maintaining forward momentum;
- a capacity to manage multiple projects and continually balance competing priorities within a dynamic environment; and
- an ability to work independently and collaboratively, supporting the success of all colleagues and prioritizing UTEP's overall goals above personal achievement.

A bachelor's degree in law, estate or financial planning, or a related field and seven years of experience working in collaboration with donor or prospective donor's financial advisors and/or attorney to execute philanthropic gifts, proposing and executing gifts of assets is preferred for this role.

SALARY AND BENEFITS

The salary range for this position is \$120,000 to \$130,000. The University of Texas at El Paso offers a comprehensive [benefits package](#).

LOCATION

The University of Texas at El Paso is in El Paso, Texas. The Institutional Advancement division operates in a hybrid work environment (a combination of on- and off-campus). Institutional Advancement is seeking a candidate within a commutable distance from campus.

APPLICATION INSTRUCTIONS

All applications must be accompanied by a cover letter and résumé. ***Cover letters should be responsive to the mission of the University of Texas at El Paso as well as the responsibilities and qualifications stated in the prospectus.***

In keeping with its access, excellence and impact mission, The University of Texas at El Paso is committed to an open, diverse, and inclusive learning and working environment that honors the talents, respects the differences, and nurtures the growth and development of all. We seek to attract faculty and staff who share our commitment.

The University of Texas at El Paso is an Equal Opportunity/Affirmative Action Employer. The University does not discriminate on the basis of race, color, national origin, sex, religion, age, disability, genetic information, veteran status, or sexual orientation and gender in employment or the provision of services in accordance with state and federal law. Discrimination on the basis of sex includes an employee's or prospective employee's right to be free from sexual harassment under Title IX of the Higher Education Amendments of 1972.

For accommodation information for employees and applicants with disabilities, please contact UTEP's Equal Opportunity Office at eoaa@utep.edu.

To apply for this position, visit: [Executive Director for Planned Giving, University of Texas at El Paso](#).

To nominate a candidate, please contact Tom Herbert: tomherbert@aspenleadershipgroup.com.

All inquiries will be held in confidence.