

Associate Director of Gift Planning  
Raleigh, North Carolina

**The Opportunity | NC State & University Development**

North Carolina State University (NC State) was founded in 1887 as a land-grant institution with the purpose of creating economic, societal and intellectual prosperity for the people of North Carolina. Today it is the largest university in the state with more than 34,000 high-performing students, 8,000 pre-eminent faculty and staff and 205,000 living alumni. NC State is known for its leadership in research, education and service and as a research extensive university, is recognized for its strengths in science, engineering and technology. The University consistently ranks among the top public national universities and one of the best values in higher education.

The mission of University Development within the Division of University Advancement at NC State is to raise philanthropic support for university goals and priorities that benefit our students, faculty, this campus and ultimately, the state of North Carolina. The department includes the offices of Annual Giving, Central Major Gifts, Corporate and Foundation Relations and Gift Planning.

In 2016, NC State launched the Think & Do the Extraordinary Campaign, the most ambitious fundraising effort in the history of the university with a $1.6 billion goal. Priorities include dramatically increasing endowment to benefit students and faculty, enhancing facilities and strengthening support for current operations.

**The Position |** *Associate Director of Gift Planning*

Gift planning is a program area of considerable scope and complexity including management of estate gifts, wills and bequest intentions, retirement plans, real estate, life insurance, charitable trusts and other gift vehicles. Reporting to the Executive Director of Gift Planning and working in close collaboration with members of the University Development team, the Associate Director will work on the implementation and administration of the campus wide Gift Planning program, partnering with Development Officers and affiliated entities to provide counsel to prospective donors and their advisers on all aspects of gift planning.

The Associate Director will be responsible for building and maintaining an active portfolio of 125-150 gift planning prospects and be expected to engage prospects through face-to-face meetings and personal contacts. He/she will maintain strong relationships with existing donors through annual stewardship visits.

The Associate Director will perform other duties related to the operation of the office of Gift Planning as assigned by Executive Director. This means working closely with other members of Gift Planning team, University Development, Development Officers and the Advancement Services staff.

**Duties and Responsibilities:**

* Work in close collaboration with the Executive Director of Gift Planning to develop fundraising goals and plans for planned and blended gifts from individuals including charitable trusts, bequests and complex outright gifts.
* Participate in all aspects of the gift cycle, and lead strategies to identify, qualify, cultivate and manage a pool of approximately 125 major gift ($50,000+) prospects; monitor and report progress regularly.
* Develop strategic relationships with campus colleagues and external stakeholders, including financial advisors that result in effective partnerships and increased philanthropic funding.
* Work closely with the prospect research team to develop a strong and continuous donor pipeline.
* Ensure that all donors are appropriately recognized, thanked and receive regular contact and communication by making donor engagement and stewardship a priority.
* Collaborate effectively with the offices of Central Major Gifts, Corporate and Foundation Relations, Annual Giving, and unit/college advancement offices to maximize leads and partnering opportunities.
* Serve as a resource for development officers by assisting with planned giving discussions and donor presentations, as well as developing strategies for blended gifts to leverage gift potential.
* Participate in all relevant University-wide development activities and meetings.

**Education and Experience**

Bachelor’s degree from an accredited college or university is required, an advanced degree and/or CFP, CPA, CFA or other related professional certificate is preferred. At least five years of successful fundraising experience, ideally in higher education, or similar record of success in a related career field such as accounting, law, or financial planning is required.

**Essential Skills, Requirements and Preferred Qualifications**

* Experience in financial planning, law, trust/estate administration or the financial service industry.
* Knowledge of Federal tax law, with an emphasis on charitable deductions.
* Familiarity with estate planning strategies to include wills, trusts, retirement plans and life income plans is preferred.
* Excellent listening, communication, and interpersonal skills; ability to communicate clearly in person and in writing with a diverse group of people.
* Strong organizational and analytical skills, with a high attention to detail.
* Ability to form trusting relationships and work collaboratively with a team in a semi-independent, often fast-paced environment.
* Ability to manage competing priorities and meet deadlines in a dynamic team environment.
* Understanding and comfort with outreach to establish new relationships, negotiate, and close gifts.
* Unquestioned integrity is required.
* Self-motivated, positive and persistent with an entrepreneurial approach to problem solving.
* Computer literacy and competency with electronic donor information systems; experience with planned giving software and donor databases including Advance and Kaspick is preferred.
* Familiarity with NC State University or UNC system is preferred.

**Other Work/Responsibilities**

Perform other duties as required or assigned by the Executive Director of Gift Planning. Attend a variety of events throughout the year. Regular travel and occasional night and weekend work is required.

[**To apply – click here**](http://smrtr.io/DjfT)

NCSU has retained Capital Development Services to assist with recruitment for this position. Candidates must provide a cover letter, resume, and list of three references. All materials will be kept confidential. Additional inquiries may be directed to Jen Tozier at Capital Development Services, 336-747-0133 x 208 or [**searchservices@capdev.com**](mailto:searchservices@capdev.com).