Director of Gift Planning

Posting Details

Posting Information

Posting Number	PG191938EP
Internal Recruitment	No
Working Title	Director of Gift Planning
Anticipated Hiring Range	$92,000 - $110,000
Work Schedule	Monday - Friday; 8:00-5:00 pm
Job Location	Raleigh, NC
Department	University Development

About the Department

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 37,000 high-performing students, 8,000 pre-eminent faculty and staff and 260,000 living alumni. NC State excels in science, technology, engineering and math, and is also at the forefront of teaching and research in agriculture, business, design, education, humanities and social sciences, natural resources, textiles and veterinary medicine. The university consistently ranks among the top public universities in a variety of categories and programs and is widely considered one of the best values in higher education.

About the Department – University Development:
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.

We take a great deal of pride in our collaborative, supportive and collegial team culture. We value diversity, equity and inclusion understanding that diverse perspectives and experiences strengthen our team and ensure greater success in fulfilling our mission. All staff are provided opportunities for training and professional development with an eye to personalized career growth.

Essential Job Duties

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. Planned Gifts accounted for 26% of all giving during the Think and Do the Extraordinary Campaign which was completed in December, 2021.

Reporting to the Executive Director of Gift Planning and working in close collaboration with members of the University Development team, the Director will be responsible for identifying and qualifying prospects, and for building and maintaining an active portfolio of 125-150 gift planning prospects. He/she will be expected to engage donors and prospects through face-to-face meetings and personal contacts. The Director will also work to maintain strong relationships with existing donors through annual stewardship visits.

The Director will work on the implementation and administration of the campus wide Gift Planning program. He/she will regularly meet and partner with colleagues in college and unit-based fundraising operations to investigate the viability of identified fundraising opportunities and provide counsel to prospective donors and their advisers on all aspects of gift planning.

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

The Director performs these duties in a professional and positive manner, and demonstrates integrity, good judgment, and the ability to work well with a variety of people and styles.

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 estate gifts, wills and bequest intentions, retirement plans, real estate, life insurance, charitable trusts and other gift vehicles.
- Participate in all aspects of the gift cycle; lead strategies to identify, qualify, cultivate and manage a pool of gift planning donors and prospects, monitoring and reporting progress regularly.
- Collaborate effectively with the offices of Central Major Gifts, Corporate and Foundation Relations, Annual Giving, and unit/college advancement offices to develop strategies for blended gifts and to maximize leads and partnering opportunities; serve as a resource by assisting with planned giving discussions and donor presentations.
- 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.
- Participate in all relevant University-wide development activities and meetings.

Other Responsibilities and Duties:

- 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.

Other Responsibilities

- The Director will perform other duties related to the operation of the office of Gift Planning as assigned by Executive Director.
- This individual will work closely with other members of Gift Planning team, Development Officers, Donor Relations staff, and the Advancement Service staff.
- The Director will be responsible for maintaining list of externally managed trusts and provide annual valuations to Foundations Accounting and Investments.
- The Director will also provide education to internal and external audiences on topics related to gift planning through presentations/speaking opportunities.

Qualifications

Minimum Education and Experience

Post-baccalaureate credentials or Bachelor’s degree from an accredited college or university and at least five (5) years of successful fundraising experience or similar record of success in a related career field such as sales, financial planning, or wealth management is required.

Other Required Qualifications

- Goal-oriented, self starting individual with high attention to detail.
- Demonstrated ability to handle multiple priorities with strong interpersonal and organization skills. Proficiency in Word, PowerPoint, and Excel required.

Preferred Qualifications

- Familiarity with gift planning including wills, trusts, retirement plans and life income gifts;
- Experience in higher education fundraising;
- Familiarity with NC State University;
- An advanced degree and/or CFP, CPA, CFA or other related professional certificate;
- Experience in financial planning, law or trust/estate administration.

Required License(s) or Certification(s)

A valid North Carolina Driver’s License is required within 60 days of start date. Must be maintained as a condition of employment. Regular local travel and some regional/out-of-state travel is required for this position.

Valid NC Driver's License required

Yes

Commercial Driver's License required

No

Recruitment Dates and Special Instructions

Job Open Date

08/02/2022

Anticipated Close Date

Special Instructions to Applicants	Please include as attachments a resume, cover letter, and contact information for at least three (3) professional references.

Position Details

Position Number	00008175
Position Type	SAAO Tier II
Full Time Equivalent (FTE) (1.0 = 40 hours/week)	1.0
Appointment	12 Month Recurring
Mandatory Designation - Adverse Weather	Non Mandatory - Adverse Weather
Mandatory Designation - Emergency Events	Non Mandatory - Emergency Event
Is this position partially or fully funded on ARRA stimulus monies?	No
Department ID	082001 - University Development
AA/EEO	NC State University is an equal opportunity and affirmative action employer. All qualified applicants will receive consideration for employment without regard to race, color, national origin, religion, sex, gender identity, age, sexual orientation, genetic information, status as an individual with a disability, or status as a protected veteran. If you have general questions about the application process, you may contact Human Resources at (919) 515-2135 or workatncstate@ncsu.edu. Individuals with disabilities requiring disability-related accommodations in the application and interview process, please call 919-515-3148. Final candidates are subject to criminal & sex offender background checks. Some vacancies also require credit or motor vehicle checks. Degree(s) must be obtained prior to start date in order to meet qualifications and receive credit. NC State University participates in E-Verify. Federal law requires all employers to verify the identity and employment eligibility of all persons hired to work in the United States.

Supplemental Questions

Required fields are indicated with an asterisk (*).

1. * How did you learn of this opportunity?

- NCSU Website
- Job Alert (automated email from our system)
- NCSU Executive Search Services
- Monster.com
- CareerBuilder.com
- InsideHigherEd.com
- HigherEdJobs.com
- Other Online Job Board
- Carolina Job Finder / Employment Guide
- Job / Career Fair
- The Chronicle of Higher Education
- Professional Journal
- Print Advertisement (Newspaper / Periodical)
- Radio / Television Advertisement
- Professional Organization
- Higher Education Recruitment Consortium (HERC)
- Direct Contact from NCSU HR Representative / Recruiter
- NCSU Employee Referral

- Social Media (LinkedIn, Twitter, Facebook, Other)
- Other

2. If you learned about this vacancy from "other source" or "other website", please provide the source.
   (Open Ended Question)
3. * Do you have post-baccalaureate credentials or a bachelor's degree plus alternative or equivalent professional training and experience?

   - Yes
   - No

4. * Please briefly describe your gift planning (or financial planning) experience including experience and/or familiarity with wills, trusts, life income plans, and tax laws.
   (Open Ended Question)
5. * Please list any relevant certifications, licenses, and/or credentials that you have that pertain to this position.
   (Open Ended Question)

Application Materials Required

Required Documents

1. Resume
2. Cover Letter
3. Contact Information for References

Optional Documents