

Position Announcement

Director of Planned Giving

University of North Carolina at Charlotte
Charlotte, North Carolina

Reports To Executive Director of University Development

Organization Profile The University of North Carolina at Charlotte is a research intensive institution. It is the fourth largest campus among the 17 institutions within the nationally recognized University of North Carolina system. UNC Charlotte is the largest institution of higher education in the rapidly growing Charlotte region, which is regularly listed as one of the best places to live and do business.

UNC Charlotte includes seven professional colleges and offers 23 doctoral programs, 63 master's degree programs and 77 programs leading to bachelor's degrees. Approximately 1,000 full-time faculty comprise the university's academic departments, and 2016 fall enrollment exceeded 28,700 students.

UNC Charlotte has nearly 130,000 living alumni, nearly 60 percent of whom live and work in the greater Charlotte region.

The Office of University Advancement is a component of University Advancement with a mission to build philanthropic relationships that engage alumni, donors, students, faculty and the community in supporting the University's priority projects and initiatives.

Niles F. Sorensen
Vice Chancellor for University Advancement

Niles F. Sorensen provides executive leadership for the Division of University Advancement. He also serves as president of the UNC Charlotte Foundation, working with an appointed 45-member board to enhance the university's



ongoing base of private support, and works with the 32-member UNC Charlotte Alumni Association Board of Directors to expand the institution's alumni-related programs and activities, including establishing vibrant in-state and out-of-state chapters.

Prior to joining the University in 2006, he was Executive Vice President for Financial Development of the YMCA of Metropolitan Los Angeles with responsibility for all aspects of fundraising for the 254,000-member, 25-branch human service organization.

Sorensen holds a Bachelor of Science in Public Administration from Indiana University.

Elizabeth Norwood Fischer
Executive Director of University Development

Beth Fischer works with the Chancellor and Vice Chancellor of University Advancement to engage the University's key stakeholders. She oversees planned giving, corporate and foundation relations, campaign activities, donor relations and the major gifts team.



Beth joined UNC Charlotte in 2005 as the Director of Development for the Belk College of Business. Subsequent positions include serving as Director of Principal Gifts and Senior Director of Principal Gifts and Corporate Relations for UNC Charlotte.

She earned a J.D. from Case Western Reserve University School of Law after completing her bachelor's degree in management from Guilford College. Beth also holds a certificate of nonprofit management from the Mandel Center for Nonprofit Organizations and earned the Certified Fundraising Executive (CFRE) designation in 2008. Fischer was selected as a Charlotte Business Journal's 40 Under 40 award winner in 2009.

Beth is an active member of Women Executives and the Charlotte Chapter of the Association of Fundraising Professionals (AFP). Her previous community leadership roles include serving as president of AFP Charlotte and chair of National Philanthropy Day. Additionally, she is a former member of the Guilford College Board of Visitors, the US Airways Education Foundation Advisory Board, Leave a Legacy steering committee, and a former board member of the Friends School of Charlotte.

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**Position
Summary**

Under the supervision of the Executive Director of University Development, the Director of Planned Giving assists in furthering the mission of the University by developing relationships that ensures philanthropic support of the University through planned and major gifts. Planned giving is a significant component of a comprehensive development program at the university. It complements other forms of fundraising, especially major gifts solicitation.

The Director is responsible for planning, directing and soliciting both planned and major gifts for University priority programs. As the University's primary gift officer for planned giving, the Director will have management responsibility to develop a deferred giving program recognized for its thorough immersion of multiple constituencies in knowledge and benefits of a variety of planned giving opportunities.

The Director will be the source of education for the Office of University Development staff on issues related to planned giving so that all members have current understanding for identifying donor traits that make a planned gift a viable option. The Director will generate relationships with local financial advisors and provide them with funding attractions associated with campus priority projects established by the university administration. The Director will have expertise in all of the common planned giving vehicles including bequests, trusts, pooled income funds, deferred gifts, and annuities.

The Director will establish marketing strategies targeted to donors and prospects and develop goals for planned giving. The Director will be responsible for identifying, cultivating, and soliciting planned and major gifts (\$25,000+) from all University constituencies.

The Director of Planned Giving will work closely with the major gift team and actively cultivate donor prospects for both major and planned gifts—or a combination of those gift types. The Director will continuously carry a generous portfolio of donor prospects and make personal cultivation and solicitation calls—actively calendaring an average of 75% of worktime in off-campus visits.

The Director will manage support staff that will assist in the necessary planned giving proposals created for planned giving prospects. He/She will provide timely information to donors regarding their gifts to the University and will be fastidious in recording donor call activity as required of all gift officers in the Office of University Development. Having close collaboration with the Executive Director of Development, the Director of Planned Giving has independence in decision-making for the areas of assigned responsibility.

Duties & Responsibilities

Marketing

- Market to prospective donors through the hosting of seminars, mailings of targeted appeals, and by electronic means such as on-line newsletters.

Fundraising

- Manage a planned giving program and work with central development major gift prospects in support of the University's mission. The director serves as primary university solicitor of planned gifts.
- Responsible for the development, management and solicitation of an active portfolio of 125-150 planned and major giving prospects and donors annually who are in various stages of identification, cultivation, solicitation and stewardship through a moves management system, and administering open estates through distribution and closing.
- Proactive solicitation of prospects for planned gifts. Active prospects will typically have the capacity to give a minimum of \$100,000 to several million dollars. Work closely and collaboratively with unit-based gift officers in the solicitation of planned gifts for their constituency areas. Prepare proposals for planned gift prospects.
- Develop and implement a marketing and stewardship plan to create a stream of planned giving prospects through activities such as targeted mailings, seminars, referrals, alumni relations and electronic communications.
- Work closely with legal and financial professionals in designing and executing planned giving instruments.
- Develop planned giving policies, budget, integration

strategies, priorities and goals in consultation with the Executive Director of University Development and in conjunction with overall development goals of the university.

- Provide advice on solicitation strategies, especially related to tax and estate planning benefits, to all University major gift fundraisers and provide training to staff and volunteer fundraisers.
- Enter appropriate information into Banner database to record prospect contact information for historical, current and future strategy development. Coordinate research efforts with the Manager of Prospect and Donor Research to provide information on current prospects and to identify new prospective donors.
- Be thoroughly knowledgeable on all planned giving vehicles and regularly update knowledge through professional development seminars. Develop and maintain thorough understanding of relevant tax, probate, trust and financial/estate planning information and of the university's programs, plans and staff members.

Stewardship

- Steward planned gift donors through the *Bonnie Cone Society* which recognizes donors who have made planned gifts to the University.

Qualifications

Qualities and experiences that ideal candidates should display include:

- An earned baccalaureate degree from an accredited college or university.
- Five to ten years experience working as a university development officer.
- Demonstrated track record of success in leading, mentoring, and inspiring staff to achieve goals and fostering an attitude of staff responsiveness.
- Possess strong experiences with all common planned giving vehicles and a thorough understanding of PG Calc™ planned giving software or equivalent.
- The ability to provide leadership, mutual respect and work effectively in diverse groups.
- The ability to work effectively in a changing organizational

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environment.

- A strong commitment to team-based management and quality of service.
- Confidence in written and verbal communication, including the ability to make compelling presentations to groups and larger public gatherings.
- A high-level of interpersonal skills.

Preferred

Preference will be given to candidates that also display one or more of the following:

- An advanced academic degree or significant life experiences including foreign travel.
- Expertise with Banner™ donor records system.
- Fundraising certification (CFRE, CSPG or equivalent).

Memorandum

The salary and benefits are competitive and commensurate with experience, qualifications, and verifiable salary history. Paschal•Murray supports the commitment of our client in encouraging applicants from diverse backgrounds and cultures. As a condition of employment, our client reserves the right to conduct background verification including academic, work, driving, and criminal histories. The position assumes an ability and willingness to work outside normal business hours.

The University of North Carolina at Charlotte is an Affirmative Action/Equal Opportunity employer and an ADVANCE Institution that strives to create an academic climate in which the dignity of all individuals is respected and maintained. Women, minorities, veterans, and individuals with disabilities are encouraged to apply. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, disability, gender identity or sexual orientation.

During the recruitment process, candidates will be directed to the appropriate UNC Charlotte website where official application will be necessary in order to fulfill Human Resource procedures.

This position announcement is not intended to be an exhaustive list of all responsibilities and requirements. It is presented as a fair reflection of the principal job elements.

Nominations and applications are welcome. Please send résumé and letter of application as separate documents attached to an e-mail message to:

Colette M. Murray, Search Consultant

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