

Assistant Vice President, Planned Giving
Northern Arizona University

Direct Link: <https://www.AcademicKeys.com/r?job=236909>

Downloaded On: Jun. 28, 2024 11:43am

Posted May 31, 2024, set to expire Sep. 27, 2024

Job Title	Assistant Vice President, Planned Giving
Department	Advancement
Institution	Northern Arizona University Flagstaff, Arizona
Date Posted	May 31, 2024
Application Deadline	July 1, 2024
Position Start Date	Available immediately
Job Categories	Vice-(President/Provost/Chancellor)
Academic Field(s)	Legal Development/Institutional Advancement Senior Administration
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Job Description

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Assistant Vice President, Planned Giving

Location: VP Advancement

Regular/Temporary: Regular

Job ID: 607862

Full/Part Time: Full-Time

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Workplace Culture

NAU aims to be the nation's preeminent engine of opportunity, vehicle of economic mobility, and driver of social impact by delivering equitable postsecondary value in Arizona and beyond.

Special Information

- This position is a hybrid position which allows the incumbent to complete their work at both an NAU site, campus, or facility *and* at a non-centralized site with or without accommodation.
- This position is posted as Assistant Vice President, Planned Giving, which is a working title. The NAU system title for this position is Director, Planned Giving.

Job Description

NAU Advancement | Foundation builds upon the university's distinguished excellence by raising awareness, engaging, and strengthening meaningful relationships, and partnering with NAU's alumni, parents, faculty/staff, and friends who have the passion and commitment to make an impact at NAU through their estate giving. This is an exceptional opportunity for an experienced, energetic, and knowledgeable professional to serve as the lead planned giving strategist and a key visionary at one of Arizona's best public universities.

NAU Advancement | Foundation seeks an experienced Assistant Vice President of Planned Giving with a proven track record of closing planned gifts, to lead the Planned Giving program at NAU. The position directs and oversees a full range of donor cultivation activities, including the development of planned giving as a critical component of a strategic fundraising plan. Oversees a staff responsible for diversifying NAU Foundation funding resources and engaging in long-term financial planning, including the creation of blended gifts, endowments, and other financial resources. Develops and implements the policies and goals for assigned unit and directs team(s) in their efforts to implement plans. Seeks opportunities to continually improve unit performance, achieve fundraising metrics, and enhance partner and stakeholder relationships.

The Office of Planned Giving works collaboratively with all NAU colleges, schools, programs, and other areas to secure alumni and friends' planned gift commitments including bequests, gifts of retirement assets and/or life insurance through a beneficiary designation, charitable gift annuities, charitable remainder trusts, and charitable lead trusts.

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This position reports directly to the Associate Vice President of Advancement.

Job Functions & Duties:

Relationship Development and Fundraising - 50%

- Conducts face-to-face and virtual visits with prospective and current donors including strategic visits with donors' legal and financial advisors.
- Manages a portfolio of diverse planned gift donors and prospective donors.
- Serves as a point of contact for all NAU and Advancement | Foundation team members, as well as other national institutions regarding estate and gift planning issues, questions, strategies, and national benchmarking best practices.
- Exercises a high-level of independent judgment and serves as an experienced professional providing strategies that include highly complex gift discussions and interactions with donors capable of making significant investments to NAU.
- Develops and drives innovative, strategic, proactive, and personalized strategies for a select group of NAU's most generous and impactful estate giving donors.
- Facilitates and coordinates proactive communications and positive relations with estate gift prospects and donors.
- Identifies high-level philanthropists and formulates strategies to promote positive prospective donor/donor engagement in alignment with the university's strategic priorities.

Strategic Leadership - 25%

- Oversees Planned Giving's fundraising strategies and goals for unit and influences the planned giving fundraising tactics and innovative strategies for college/unit fundraising.
- Defines goals, applies advance knowledge and skills across multiple areas or functions, and contributes to a variety of division working groups.
- Directs others to research, identify, and contact planned giving prospects.
- Attends speaking engagements and delivers planned giving trainings for development team.
- Manages the Planned Giving annual budget.
- Provides strategic oversight of the design and development of proposals, planned gift illustrations and agreements, all print and web-based marketing materials, and provides guidance on the promotion, management, and stewardship of the 1899 Society-NAU's estate gift recognition society.

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Management - 20%

- Provides input for performance and rewards decisions, influences employment decisions, allocates resources, and approves resource use decisions.
- Supervises, coaches, and mentors the Planned Giving staff, sets and evaluates performance goals, plans work, resolves conflicts, addresses performance issues, and conducts formal performance reviews.
- Evaluates individual and team performance and prioritizes university development needs across the university.
- Develops and improves existing standards to promote maximum team/organization effectiveness.
- Promotes maximum team/organization effectiveness.
- Pays close attention to detail in work productivity while remaining flexible for big-picture/systems thinking.
- Identifies opportunities for change and improvement.
- Identifies strengths and weaknesses of alternative solutions and recommends approaches to solve complex problems.

Other - 5%

- Other duties as assigned.

Minimum Qualifications

- Bachelor's degree in relevant field, and
- 3-5 years of management experience, and
- 5-7 years or relevant experience; or
- Any combination of relevant education and experience may be substituted for the educational requirement on a year-for-year basis.

Preferred Qualifications

- Master's degree in relevant field or Juris Doctorate degree.
- Certified Specialist in Gift Planning ("CSGP") certification.
- Demonstrated experience fundraising at a comprehensive research university and/or experience in the estate-planning sector with in-depth experience of planned giving vehicles.
- 8-10 years of experience developing and managing meaningful giving relationships with a

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portfolio of individuals who can be high-level (prospective) planned gift donors.

- Comprehensive campaign experience with gift planning, gift recording, and implementation of best practices.
- Demonstrated experiencing empowering, supporting, and managing a high-performance team.

Knowledge, Skills, & Abilities

Knowledge:

- Knowledge of estate planning, including blended gifts, wills, trusts, and estate and gift tax laws.
- Experience with investments, wealth management, financial markets, and real estate.
- Firsthand knowledge of national best practices related to advancement, estate gifts, and comprehensive campaigns.
- Success in leading complex innovative, and creative gift strategies and negotiations in collaboration with academic leaders, volunteers, and donors' financial and legal representatives.
- Expert appreciation and practice of how to research, validate, cultivate, solicit, and steward estate giving donors and prospective donors.
- Proven success working with stakeholders; excellent strategic planning and project management skills; experience in a data-driven environment; organizational skills; and the ability to lead, influence, and motivate others.
- Knowledge of legal recordkeeping requirements for fundraising and documenting donations.
- Advanced knowledge of practices, developments and techniques used in university development.
- Knowledge of common management tactics.
- Knowledge of university development industry trends in higher education.

Skills:

- Project management skills.
- Financial planning and goal development skills.
- Conflict resolution and customer service skills.
- Planning, organizing, directing, facilitating, and goal setting skills.
- Strong leadership skills.
- Build and maintain excellent relationships with planned giving vendors.
- Skilled in using advancement/fundraising databases.

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Abilities:

- Ability to think broadly and creatively about strategies to engage and cultivate a defied group of prospective donors to secure planned gifts that meet NAU's strategic priorities.
- Coordinates team members and allocates tasks.
- Communicates effectively.
- Manages relationships.
- Analyzes complex situations/problems, anticipates issues, and makes well-reasoned, sound decisions.
- Uses impartial judgement, diplomacy and equity while working with various stakeholders.
- Balances competing priorities.
- Communicates the benefits of change to team members.
- Ability to work independently and collaboratively with a team and across the university.
- Manages and drives change.
- Promotes a diverse, inclusive environment.

Background Information

This position has been identified as a safety/security sensitive position. Therefore, per AZ Revised Statute, Northern Arizona University requires satisfactory results for the following: a criminal background investigation, employment history investigation, degree verification (in some cases) and fingerprinting. If you are applying for a job that requires a CDL, you will be required to register with the Federal Motor Carrier Safety Administration Drug & Alcohol Clearinghouse and adhere to the clearinghouse requirements. Additionally, as an employer in the state of Arizona, NAU is required to participate in the federal E-Verify program that assists employers with verifying new employees' right to work in the United States. Finally, each year Northern Arizona University releases an [Annual Security Report](#). The report is a result of a federal law known as the Clery Act. The report includes Clery reportable crime statistics for the three most recent completed calendar years and discloses procedures, practices and programs NAU uses to keep students and employees safe including how to report crimes or other emergencies occurring on campus. In addition, the [Fire Safety Report](#) is combined with the Annual Security Report for the NAU Flagstaff Mountain Campus as this campus has on-campus student housing. This report discloses fire safety policies and procedures related to on-campus student housing and statistics for fires that occurred in those facilities. If you would like a free paper copy of the report, please contact the NAUPD Records Department at (928) 523-8884 or by visiting the department at 525 E. Pine Knoll Drive in Flagstaff.

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Salary

Salary range begins at \$150,000. Annual salary commensurate with candidate's qualifications and related experience.

FLSA Status

This position is exempt from the overtime provisions of the Fair Labor Standards Act (FLSA) and therefore will not earn overtime or compensatory time for additional time worked.

Benefits

This is a Service Professional (SPF) position. NAU offers an excellent benefit package including generous health, dental and vision insurance; participation in the Arizona State Retirement System or the Optional Retirement Program; 22 days of vacation and 10 holidays per year; and tuition reduction for employees and qualified dependents. More information on benefits at NAU is available on the [Human Resources benefits website](#). NAU is a tobacco and smoke-free campus. Service Professionals are hired on a contract basis, renewable each 6 months according to [terms of the Conditions of Professional Service](#). Employees offered a position will be eligible for state health plans (including NAU's BCBS Plan). New employees are [eligible for benefits](#) on the first day of the pay period following their enrollment, after their employment date. Employees will have 31 days from their start date to enroll in benefits. If a new employee chooses the ASRS retirement option, participation in the Arizona State Retirement System, and the long-term disability coverage that accompanies it, will begin on the first of the pay period following 6 months after the new employee's start date. New employees who choose to participate in the Optional Retirement Plan (ORP), which is an alternative to the ASRS plan for faculty and other appointed staff, will begin to participate on the first day of the pay period following election. Additionally, the long-term disability plan that accompanies the ORP will begin on the first day of the pay period following election.

Learning and Development

Your career at Northern Arizona University includes the opportunity for professional development. [New employee on-boarding training](#) includes courses to be completed within the first 30 days.

Immigration Suppt/Sponsorship

NAU will not provide any U.S. immigration support or sponsorship for this position.

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July 1, 2024 at 11:59 p.m.

How to Apply

To apply for this position, please click on the "Apply" button on this page. You must submit your application by clicking on the "Submit" button by midnight of the application deadline. If you need assistance completing your application there are instructions available on the [Human Resources website](#) or in person in the Human Resources Department located in Building 91 on the NAU Campus - on the corner of Beaver and DuPont Streets.

If you are an individual with a disability and need reasonable accommodation to participate in the hiring process, please contact the Disability Resources Office at 928-523-8773, DR@nau.edu, or PO Box 5633, Flagstaff AZ 86011.

Equal Employment Opportunity

Northern Arizona University is a committed Equal Opportunity/Affirmative Action Institution. Women, minorities, veterans and individuals with disabilities are encouraged to apply. NAU is responsive to the needs of dual career couples.

[Know Your Rights Poster](#)

NAU is an Employer of National Service. AmeriCorps, Peace Corps, and other National Service alumni are encouraged to apply.

To apply, visit

https://hr.peoplesoft.nau.edu/psp/ph92prt/EMPLOYEE/HRMS/c/HRS_HRAM.HRS_APP_SCHJOB.GBL



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Contact Information

Please reference Academickeys in your cover letter when applying for or inquiring about this job announcement.

Contact

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