

Assistant Director of Planned Giving  
Northern Arizona University

Direct Link: <https://www.AcademicKeys.com/r?job=254558>

Downloaded On: Apr. 2, 2025 3:59pm

Posted Mar. 17, 2025, set to expire Jul. 15, 2025

**Job Title** Assistant Director of Planned Giving  
**Department** University Development  
**Institution** Northern Arizona University  
Flagstaff, Arizona

**Date Posted** Mar. 17, 2025

**Application Deadline** April 14, 2025  
**Position Start Date** Available immediately

**Job Categories** Associate/Assistant Director

**Academic Field(s)** Development/Institutional Advancement  
Public Relations/Marketing

**Apply Online Here** <https://apptrkr.com/6082480>

**Apply By Email**

**Job Description**

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**Assistant Director of Planned Giving**

**Location:** University Development

**Regular/Temporary:** Regular

**Job ID:** 608315

**Full/Part Time:** Full-Time

**Workplace Culture**

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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 posted as Assistant Director of Planned Giving, which is a working title. The NAU system title for this position is University Development Assistant Director.
- 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 can be located at the Flagstaff Mountain Campus or at the Phoenix North Valley Campus.

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### **Job Description**

As a member of the Planned Giving team, the Assistant Director works as part of Advancement | Foundation to oversee donor cultivation activities and integrate planned giving into the university's strategic fundraising efforts. The position collaborates with a team of development directors to diversify funding resources and engage donors in long-term financial planning, including the creation of blended gifts and endowments. The Assistant Director will stay informed of industry trends to guide strategic decisions and ensure a sustainable fundraising pipeline for the NAU Foundation. This position requires regular communication with university partners to identify and cultivate potential donors to increase their philanthropic potential through a blended or planned gift.

The Assistant Director of Gift Planning will manage a portfolio and cultivate relationships with major and planned gift prospects, aiming to secure significant contributions and achieve annual fundraising goals. The Assistant Director conducts annual donor visits, collaborates with development directors to identify and secure planned gifts, and partners with the Assistant Vice President of Gift Planning to develop strategic marketing plans.

The position will also work collaboratively with division colleagues to maintain the Gift Planning website, and enhance the donor experience through targeted marketing and communication strategies. The university is currently in the quiet phase of its comprehensive campaign. The position will provide guidance and support to donor engagement and solicitation activities institution-wide, while preserving and nurturing existing relationships at individual and program levels.

The position reports to the Assistant Vice President of Planned Giving.

### **Fundraising and Relationship Building - 50%**

- Oversee and engage a comprehensive portfolio of major and planned gift prospects who have the potential to philanthropically support NAU's strategic priorities.
- Annually cultivate, solicit, and steward major and planned giving donors to achieve Planned Giving goals.
- Partner with development officers, deans, and campus leadership to identify planned giving prospects and secure gifts to support key priorities within their colleges/units.
- Conceptualize and implement planned giving fundraising strategies that enhance and support the university's fundraising priorities.
- Work collaboratively with all university partners to secure alumni and friends' planned gift

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commitments, including bequests, gifts of retirement assets and/or life insurance through a beneficiary designation, and charitable gift annuities.

- Lead the development of and delivery of complex gift agreements, proposals, donor acknowledgements, and customized impact reports.
- Assist, and when appropriate, lead the development of complex proposals for soliciting planned giving donors, using knowledge from varied sources to ensure they are accurate and complete.

### **Communications and Marketing - 30%**

- Partner with the Asst. Vice President of Planned Giving to create and execute a strategic marketing plan, campaigns, and audience segmentation to acquire new gift planning prospects and retain existing donors.
- In partnership with the Advancement Communications team, develop relevant gift planning content for multi-channel campaigns, website, newsletters, etc.
- Track responses to marketing campaigns, assess their effectiveness, and collaborate with development directors to follow-up with prospects.
- Collaborate with division partners on the organization and execution of high-profile gift planning events, including donor appreciation events, seminars, and workshops.
- Ensure the Planned Giving website and fundraising dashboards are accurate, showcasing current campaigns, and the impact of past legacy gifts.
- Conduct high-level analysis, compile information, and develop gift planning reports for leadership.
- Observe trends and relevant strategies in planned giving.

### **Program Administration - 15%**

- Help develop and build the consensus around fundraising policies, reporting, and procedures with internal and external partners.
- Observe relevant industry trends to inform strategic decisions.
- Conduct high level analysis, compile information, and develop timely and accurate reports on key metrics for leadership.
- Through collaborative strategy and report generation, identify risk factors and address the need for risk mitigations to ensure fundraising effectiveness.
- Track and record constituent records, monitor constituent giving, communications, etc. utilizing the NAU Foundation's constituent database.

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### Other - 5%

- Other duties as assigned.

### Minimum Qualifications

- Bachelor's degree in relevant field; and
- 3-5 years of experience managing meaningful giving relationships with a portfolio of individuals who can be high-level (prospective) planned gift donors. Relevant experience includes:
  - Experience working within a donor database.
  - Event and project management experience.
  - Experience working in higher education or non-profit setting; and
- 2-4 years of management experience;
- 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.
- Experience in estate giving principles and best practices.
- Comprehensive campaign experience.

### Knowledge, Skills, & Abilities

#### Knowledge

- Direct experience with fundraising.
- Knowledge of estate planning, including blended gifts, wills, trusts, and beneficiary gifts.
- Proven track record of developing and managing meaningful giving relationships with a portfolio of high-level planned gift individuals and closing planned gifts.
- Advanced knowledge of practices, developments and techniques used in engagement and fundraising work.

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### Skills

- Strong organizational and planning skills with the ability to initiate, collaborate, implement, monitor, evaluate, advance, and report on strategic plans that support the activities of, and contribute to, Advancement | Foundation's overall strategic goals and targets.
- Superior interpersonal skills with proven ability to successfully interact and collaborate with varied constituencies in a professional manner, exhibiting excellent communication skills, and demonstrating tact, poise and diplomacy while working with a wide variety of personalities.
- Project management skills.
- Conflict resolution and customer service skills.
- Planning, organizing, directing, and facilitating skills.
- Working in a data driven environment.

### Abilities

- Demonstrated team player with the ability to gain trust and confidence of colleagues and constituents.
- Experience and credibility when presenting materials to both internal and external constituents including individuals from a variety of culturally diverse backgrounds.
- Demonstrated commitment to excellence, honesty, transparency, and high levels of collaboration.
- Must be a detail-oriented, self-starter with a demonstrated ability to work independently and manage multiple projects and priorities to meet aggressive timelines and challenging deadlines with minimal supervision.
- Entrepreneurial spirit, taking initiative and actively seeking to deepen current donor relationships and forge new ones.
- Communicates effectively.
- Uses impartial judgement, diplomacy and equity while working with various stakeholders.
- Analyzes complex situations and anticipates issues.
- Promotes a diverse, inclusive environment.
- Experience working with sensitive information and ability to maintain strict confidentiality.
- Proven ability to work independently; a self-starter with energy, humility and enthusiasm.

### Background Information

This position has been identified as a safety/security sensitive position. Therefore, per AZ Revised

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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.

### Salary

Salary range begins at \$77,871. 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

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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.

### Application Deadline

April 14, 2025 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](mailto: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





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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/ph92prta/EMPLOYEE/HRMS/c/HRS\\_HRAM.HRS\\_APP\\_SCHJOB.GBL](https://hr.peoplesoft.nau.edu/psp/ph92prta/EMPLOYEE/HRMS/c/HRS_HRAM.HRS_APP_SCHJOB.GBL)

### **Contact Information**

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

#### **Contact**

Executive

Northern Arizona University

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