

**The University of North Carolina General Administration
EPA Designation Request Form**

Institution: UNC Asheville

Division/School/Department: University Advancement/Planned Giving

EPA Designation Requested:

- Senior Academic and Administrative Officer, I.A.* (SAAO, Tier I)
 Senior Academic and Administrative Officer, I.B.* (SAAO, Tier II)
 Instructional, Research and Public Service (IRPS)

Proposed Position Information:

Proposed Title: Director of Planned Giving and Major Gifts

Proposed Working Title (if different): Same as above

Proposed Position Number: 000008 Proposed JCAT Code: 437014

Current Status: SPA EPA New Position

Current Position Information (if applicable)

Current Title: Director of Planned Giving

Name of employee in position: Julie Heintish

Name and title of supervisor: Buffy Bagwell, Vice Chancellor for University Advancement

Institutional Authorization:

Print Name: Jaime Head Title: Classification and Compensation Specialist

Signature:  Date: 07/09/2013

Mailing Address: Human Resources, CPO #1450, One University Heights, Asheville, NC 28804

Mailing Address 2: _____

Telephone: 828-350-4587 Fax: 828-251-6385 Email: jhead@unca.edu

Electronically submit completed form with the following required documentation scanned into a single PDF package:

- A written justification for requested action to include specific reference to relevant elements in SAAO definition or Instructional/Research definitions.
- A detailed position description.
- An organizational chart that includes position titles, position numbers, position designations (SPA, EPA, SAAO), and employee names.

Submit to: hrab@northcarolina.edu

Questions to: Keith Dupuis, HR Consultant, (919) 843-5479, kedupuis@northcarolina.edu

Human Resources Department
228 Phillips Hall, CPO# 1450
UNC Asheville, One University Heights
Asheville, North Carolina 28804-8503

July 9, 2013

T 828 | 251-6605
F 828 | 251-6385

hum_res@unca.edu
www.unca.edu/hr

William Fleming
Vice President for Human Resources
The University of North Carolina
910 Raleigh Road
P.O. Box 2688
Chapel Hill, NC 27515-2688

Dear Mr. Fleming:

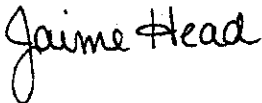
I respectfully request a title change for position #000008 from “Director of Planned Giving” to a new title of “Director of Planned Giving and Major Gifts.”

This title change will reflect a broader scope of responsibility for this position in regards to meeting fundraising goals. This change reflects the ongoing need to identify, cultivate and solicit funds using a variety of different methods to meet the needs of the University. This position will still have direct responsibility for the solicitation of funds. With your approval, this position will continue to be considered an EPA Senior Academic Administrative Officer (SAAO Tier II) position within our University Advancement division.

This position reports to the Vice Chancellor for University Advancement.

I have included an updated job description and organizational chart for your review. Thank you for your attention to this request. Please let me know if I can provide additional information or assistance. I appreciate your consideration.

Sincerely,



Jaime Head
Classification and Compensations Specialist
UNC Asheville



Job Description

Classification title: Director of Planned Giving and Major Gifts

Working Title: Director of Planned Giving and Major Gifts

Position number: 000008

Name of immediate Supervisor: Elizabeth "Buffy" Bagwell

Supervisor's Position Title and Number: Vice Chancellor for University Advancement, Position #000005

Division: University Advancement

Department: Planned Giving

SPA/EPA: EPA

Terms of Employment: Full-Time

Number of Months: 12 Months

OA Category: Professional (30)

Proposed salary: Current Salary \$76,000

Job Objective: This position is responsible for managing a planned giving and major gifts program for the university. She/he will serve as the primary university solicitor of 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 of Planned Giving and Major Gifts is responsible for planning, directing and soliciting gifts for generating support through bequests, trusts, pooled income funds, deferred gifts, and annuities and major gifts.. She/he is responsible for identifying, cultivation, and soliciting planned and major gifts from all University constituencies, including, alumni, faculty and friends of the University.

Supervisory Responsibility: None

FLSA: Exempt

Minimum qualifications
(education/experience/skills):

This position requires possession of post baccalaureate credentials and/or equivalent independent experience.

Preferred
education/experience/skills:

Master's degree preferred. Excellent interpersonal skills, strong verbal and written communication, and strong organizational skills.

Knowledge, skills and abilities
required (Functional Competencies):

Working knowledge of all facets of fundraising including annual giving, campaigns, prospect management, planned giving and grant writing. Demonstrated track record in fundraising, working with volunteers, donor cultivation and stewardship, and planning and executing special events.

Work schedule and hours:

Normal Monday-Friday work week with evenings and weekend work as needed. Some travel to cultivate and solicit prospects will be required to be successful in this position.

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. Administer open estates through distribution and closing. Proactive solicitation of prospects for planned and major gifts. Active prospects will typically have the capacity to give a minimum of \$25,000 to several million dollars. Work closely and collaboratively with other development professionals in the solicitation of planned and major gifts. Prepare proposals for planned gift prospects. Provide timely information to donors regarding their gifts to the University.

Design, manage and execute a comprehensive plan that establishes priorities, sets objectives and measures activities critical to the area of planned giving fundraising. The Director of Planned Giving and Major Gifts serves as the primary university solicitor of planned and major gifts.

Essential Job Functions:

Be responsible for the identification, cultivation, solicitation and stewardship of major donors and prospects, and focus on growing the alumni and non-alumni base of outright and deferred planned and major giving donors.

Develop and maintain personal contact with prospects for major and deferred gifts and provide information concerning gift utilization; coordinate with prospects attorney or financial professional in determining the most appropriate method of deferred giving and ensure necessary arrangements for collection of gifts. Administer open estates through distribution and closing. Conduct between 125 and 175 personal visitations per year, with the majority as face-to-face visits, to provide a one-on-one relationship with potential donors and professional advisers.

Prepare and review documents for planned/deferred gift arrangements for prospective donors, contacting the benefits and options available through the use of computerized scenarios and other descriptive presentations. Provide tax and estate planning information necessary to secure or promote planned/deferred gifts.

Develop and implement a marketing and stewardship plan to create a stream of planned giving prospects through activities such as targeted

mailing, planned giving illustrations and proposals, seminars, referrals, alumni relations and electronic communications referrals. Develop and coordinate with the e Social Media and Marketing Manager marketing materials that include web, print and face-to-face platforms. The marketing plan should be designed to motivate donors to provide both short-range and long-range support for endowed scholarships and other university programs.

Develop planned giving policies, budget, integration strategies, priorities and goals in consultation with the Vice Chancellor and Associate Vice Chancellor for University Advancement and in conjunction with the overall development goals of the university. Work closely with the Associate Vice Chancellor for University Advancement to collaborate on major gifts and planned giving into University Advancement's comprehensive fundraising strategies.

Provide advice on solicitation strategies, especially related to tax and estate planning benefits, to all University major gift fundraisers and provide training to other staff as needed.

Maintain sufficient records, contact reports, and background data to facilitate periodic reports on activities, costs, and results. Establish and maintain follow-up system(s). Enter appropriate information into Banner database to record prospect contact information for historical, current and future strategy development. Coordinate research efforts with the Associate Director of Advancement Services for Prospect Management and Research to provide information on current prospects and to identify new prospective donors.

Manage the Laurel Society which recognizes individuals who have included the UNC Asheville Foundation in their financial and estate planning.

Assist in planning and coordinating workshops, seminars and campus visits for special donor prospects to acquaint alumni, friends, and professional groups with the needs and benefits of providing support.

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.

Coordinate deferred giving with University administration to ensure compliance with governmental regulations and University and/or investment policies.

Make recommendations for improvements in the estate planning program.

Other duties as assigned.

University Advancement

