



**JOB INFORMATION**

Job Code	OA11
Job Description Title	Sr Dir, Gift Planning
Pay Grade	UA11
Range Minimum	\$91,550
33rd %	\$117,490
Range Midpoint	\$130,460
67th %	\$143,430
Range Maximum	\$169,370
Exemption Status	Exempt
Approved Date:	1/1/1900 12:00:00 AM
Legacy Date Last Edited	8/6/2014

**JOB FAMILY AND FUNCTION**

Job Family:	University Advancement
Job Function:	Major & Principal Gifts

**JOB SUMMARY**

Directs the daily functions and ongoing expansion of Auburn University's comprehensive gift planning program.

**RESPONSIBILITIES**

- Directs and manages the operations of the planned giving functions of the university.
- Oversees the research, identification, and engagement of planned giving prospects through building and maintaining relationships with current and prospective donors.
- Oversees the registration and compliance with state laws for Auburn University, Auburn University Foundation, and Tigers Unlimited Foundation.
- Generates new leads through research, peer reviews, marketing efforts, newsletters, educational materials, seminars, and direct phone calls.
- Serves as a resource and authority on current tax law, IRS rules and regulations which affect the taxation, creation, and administration of planned gifts, including estate, financial, and business planning.
- Establishes benchmarks for evaluating the effectiveness and success of the planning giving program; researches, recommends, and implements improvements as appropriate.
- Creates and promotes internal training and education on the principles of planned giving.
- The nature of this role is highly externally focused, requiring frequent travel and meetings on and off campus during regular and non-traditional business hours, and is therefore expected to operate with high-levels of autonomy.

**SUPERVISORY RESPONSIBILITIES**

Supervisory Responsibility	Supervises others with full supervisory responsibility.
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**MINIMUM QUALIFICATIONS**

**To be eligible, an individual must meet all minimum requirements which are representative of the knowledge, skills, and abilities typically expected to be successful in the role. For education and experience, minimum requirements are listed on the top row below. If substitutions are available, they will be listed on subsequent rows and may only be utilized when the candidate does not meet the minimum requirements.**

## MINIMUM EDUCATION & EXPERIENCE

Education Level	Focus of Education		Years of Experience	Focus of Experience	
Bachelor's Degree	Degree in Business Administration, Marketing, Communications, Public Relations, or related field	and	8 years of	Experience in fundraising, marketing, and/or public relations	

Substitutions Allowed for Experience: Yes

*Substitution allowed for Experience: When a candidate has the required education, but lacks the required experience, they may normally apply additional appropriate education toward the experience requirement, at a rate of one (1) year relevant education per year of required experience.*

## MINIMUM KNOWLEDGE, SKILLS, & ABILITIES

Knowledge of Internal Revenue Service (IRS) gift regulations, fundraising techniques and strategies, and accounting and budgeting principles and practices. And

Ability to plan and implement fundraising programs and marketing strategies.

## MINIMUM LICENSES & CERTIFICATIONS

Licenses/Certifications	Licenses/Certification Details	Time Frame	Required/Desired
None Required.			

## REQUIRED PRE-EMPLOYMENT/ONGOING SCREENINGS

Financial History Check

## PHYSICAL DEMANDS & WORKING CONDITIONS

Physical Demands Category: Other

## PHYSICAL DEMANDS

Physical Demand	Never	Rarely	Occasionally	Frequently	Constantly	Weight
Standing			X			
Walking			X			
Sitting				X		
Lifting	X					
Climbing		X				
Stooping/ Kneeling/ Crouching		X				
Reaching			X			
Talking					X	
Hearing					X	
Repetitive Motions			X			
Eye/Hand/Foot Coordination			X			

## WORKING ENVIRONMENT

Working Condition	Never	Rarely	Occasionally	Frequently	Constantly
Extreme cold		X			

# WORKING ENVIRONMENT

Working Condition	Never	Rarely	Occasionally	Frequently	Constantly
Extreme heat		X			
Humidity		X			
Wet		X			
Noise		X			
Hazards		X			
Temperature Change		X			
Atmospheric Conditions		X			
Vibration		X			

**Vision Requirements:**  
Ability to see information in print and/or electronically.