



DIRECTOR OF PLANNED GIVING
THE NATIONAL ACADEMIES OF SCIENCES, ENGINEERING, AND MEDICINE
Washington, D.C.

[The National Academies of Sciences, Engineering, and Medicine](#)



The Aspen Leadership Group is proud to partner with The National Academies of Sciences, Engineering, and Medicine in the search for a Director of Planned Giving.

The Director of Planned Giving will be responsible for the direction and management of the planned giving program of the National Academies of Sciences, Engineering, and Medicine. The National Academies' planned giving program generates support from members and friends through outright gifts, estate, and testamentary gift commitments. Working in coordination with the Chief Development Officer and the Directors of Development for each Academy, the Director of Gift Planning will be responsible for leading a program that utilizes strategic and creative marketing efforts that effectively communicate the benefits of planned giving opportunities targeted to the membership and donor community.

The Director of Planned Giving will effectively integrate planned giving into the broader major giving and individual giving programs of The National Academies and will collaborate on efforts to identify, cultivate, solicit, record, and steward gifts from prospects whose support can be maximized through gift planning strategies. The Director of Planned Giving will provide counsel in the technical and legal aspects of planned giving and complex giving assets, as well as possess a demonstrated ability to build relationships with donors and prospects that lead to planned gifts.

The National Academies of Sciences, Engineering, and Medicine (the National Academies) are private, non-profit institutions that provide expert advice on some of the most pressing challenges facing the nation and the world. The National Academies' primary mission is to provide expert advice on the most pressing challenges facing the nation and the world. Their work helps shape sound policies, inform public opinion, and advance the pursuit of science, engineering, and medicine. Academy members are among the world's most distinguished scientists, engineers, physicians, and researchers and include more than 300 Nobel laureates.

Through a meticulous process of information collection, evidence analysis, and deliberation, The National Academies' studies provide blueprints for progress. By shining a spotlight on subjects and facilitating dialogue across disciplines, their work advances understanding of critical issues. The needs of the nation—and therefore the topics they study—change over time, but their commitment to putting sound advice to work for the public good does not.

REPORTING RELATIONSHIPS

The Director of Planned Giving will report to the Campaign Director and Interim Chief Development Officer.

PRINCIPAL OPPORTUNITIES

The National Academies are embarking on their first comprehensive fundraising campaign in nearly 20 years. With deep linkages to the top foundations and leading philanthropists in the United States and around the world, the National Academies are poised to launch a successful campaign with a transformational impact. Under the leadership of its three presidents, the National Academies are deeply committed to mobilizing philanthropic support to advance their mission.

Society is facing an array of complex policy questions. The National Academies are distinctly qualified to provide nonpartisan, objective guidance for decision-makers and the public. As they have done since their founding in 1863, they marshal the energy and intellect of the nation's leading critical thinkers to respond to policy challenges with science, engineering, and medicine at their core. This is an opportunity for the Director of Planned Giving to work closely with the leading figures in science and technology as the National Academies deepen the impact of science on the great challenges facing society and strengthen the role of science, engineering, and medicine in decision-making for the public and for policymakers.

The Director of Planned Giving is the ideal opportunity for an experienced frontline planned giving professional to join this collegial team at an exciting time. A team is being built for the future, rooted in best practice and a shared commitment to professional growth and success. The opportunity to shape and deliver a comprehensive planned giving program offers the successful candidate the platform to make a significant contribution to The National Academies.

PRIMARY RESPONSIBILITIES

The Director of Planned Giving will

- develop and implement the strategic effort to grow planned gift commitments to The National Academies in all forms and at all levels including developing proposals, personally meeting with prospects to solicit and close gift commitments, partnering with major and annual giving officers to solicit and close gift commitments, and ensuring gifts are properly recorded and stewarded;
- manage a dynamic portfolio of gift planning prospects from across each Academy and Division and regularly travel to visit with these prospective donors; be responsible for the cultivation, solicitation, and stewardship of these prospects; and, within this process, work collaboratively with other development officers as appropriate;
- prepare documents to establish charitable gift annuities, charitable reminder trusts, charitable lead trusts, and other forms of planned gifts;
- have a working knowledge of all planned giving vehicles, and develop and maintain current understanding of relevant tax, trust, and financial/estate planning information;
- provide tax and estate planning information necessary to secure or promote planned/deferred gifts;
- seek the opinions of tax, legal, and other advisers on complex matters, when appropriate;

- work closely with The National Academies' Finance Office to ensure that servicing, administration, and stewarding of deferred giving arrangements are handled promptly and efficiently;
- work with The National Academies' General Counsel Office in designing and executing planned gift agreements;
- provide advice on solicitation strategies, especially related to tax and estate planning benefits, to The National Academies' major gift fundraisers;
- develop and deliver an in-house educational program for staff, donors, and volunteers;
- work collaboratively with Development Office colleagues to identify, cultivate, solicit, and steward planned giving prospects;
- record prospect activity using Raiser's Edge; and
- supervise staff in the day-to-day activities of the planned giving program, seminars and special events.

KEY COLLEAGUES



Alison Purvis
Campaign Director
Interim Chief Development Officer

Alison Purvis joined the National Academies of Science, Engineering, and Medicine in January 2018 as Campaign Director. She previously served as interim Co-Chief Executive Officer and Director of Development of the Foundation and Friends of the Royal Botanic Gardens, Kew where she supported the successful closure of the £100 million Breathing Planet campaign. For over nine years, Ms. Purvis led the Development Department at the Natural History Museum, London, where she completed the Darwin Centre campaign, designed and delivered the Evolution campaign, and brought the world's most complete Stegosaurus fossil to the

collections for public display.

Ms. Purvis brings years of fundraising and leadership experience across a wide range of sectors; from an international NGO in Hanoi, Vietnam focusing on small business development, to leadership and fundraising at a National Museum with public engagement, scientific, and educational objectives, and, to leading institutional change and raising funds for complex, global, scientific research organizations. Alison is a graduate of St. Lawrence University in New York and recently completed the Performance Measurement for Effective Management of Non-profit Organizations at the Harvard Kennedy School. She relocated to Washington D.C. with her family after residing in London since 2001.



Mark L. Carter
Senior Director of Development, National Academy of Sciences

Mark L. Carter joined the National Academy of Sciences (NAS) as the Senior Director of Development in 2006. In collaboration with the President, executive officers, volunteers, NAS Council and staff of the NAS, and National Research Council (NRC), his primary responsibility is building a program to secure private contributions from individuals and foundations to support NAS's mission to provide independent, objective advice to the nation on matters related to science and technology, as well as its commitment to increase the public's understanding of science, and remain an active leader in the international scientific community.

Mr. Carter is a collaborative and knowledgeable fundraiser with more than two decades of fundraising experience securing all types of gifts—with 15 of those years specifically spent securing major and principal gifts. Prior to arriving at the National Academy of Sciences, Mr. Carter worked at Ohio University for six years where he successfully spearheaded the Fritz J. and Dolores M. Russ College of Engineering and Technology and Patton College of Education to the successful completion of the Ohio Bicentennial Campaign.

Mr. Carter received his bachelor's degree from Allegheny College where he double majored in Psychology and Fine Arts. He is a member of the Association of Fundraising Professional (AFP).



Radka Z. Nebesky

Senior Director of Development, National Academy of Engineering

Radka Z. Nebesky has been the Senior Director of Development for the National Academy of Engineering (NAE) since 2009. Working directly with NAE President Dan Mote, the NAE Council, staff leadership, and volunteers, she is responsible for building a program to secure private support from individuals, corporations, and foundations in support of NAE's mission to nurture and promote the engineering profession and provide authoritative, independent advice to the

nation.

Ms. Nebesky is a knowledgeable, experienced, and energetic fundraising professional with proven success in working with the engineering community. She has a background in the sciences and believes that engineering, scientific research, and education are essential to addressing society's most pressing issues.

Prior to NAE, Ms. Nebesky spent eight years at the University of Maryland's A. James Clark School of Engineering, where she was involved in building a successful development program and assisting in the planning and implementation of a \$185 million campaign for engineering.

Originally, from Prague, Czechoslovakia (now the Czech Republic) and growing up in Maryland, Ms. Nebesky earned her bachelor's degree in dietetics at the University of Maryland and a master's in business administration (MBA) at the Robert H. Smith School of Business.

CANDIDATE QUALIFICATIONS AND QUALITIES

The successful candidate for the position of Director of Planned Giving should have

- knowledge and understanding of sophisticated fundraising practices, planned giving techniques, and essential functions of a progressive fundraising organization;
- an understanding of planned giving options and appropriate application for donors;
- familiarity with legal and financial instruments such as wills, trusts, beneficiary designations, financial statements, etc.;
- an ability to conceptualize, plan, and implement a programmatic approach to building relationships and securing philanthropic support from individuals and corporations including setting realistic goals, developing strategies for prospects, prioritizing activities, asking for gifts, and orchestrating the involvement of volunteers and organization leadership;
- an ability to solve problems of substantial variety and complexity;
- an ability to undertake tasks broad in nature, requiring ingenuity and originality;
- an ability to serve as a resource to others in the resolution of complex problems and issues;

- an ability to operate independently, and exercise significant latitude for independent judgment, discretion, and action;
- experience working in complex environments with a high degree of organizational effectiveness;
- an ability to train and develop staff;
- an ability to work successfully in a team environment and to form and maintain effective teams;
- an ability to develop relationships with co-workers and employees in other departments through effective communication; and
- prior fundraising experience in a university setting or general experience in a higher education setting (preferred).

A bachelor's degree is required for this position as is five years of development experience, with at least two years of those being in senior planned giving roles. A professional certification such as CFRE, CFA, JD, or other related professional competency is preferred.

DIVERSITY, EQUITY, AND INCLUSION

It is the policy of the National Academies to recruit, hire, transfer, compensate, and promote people in all job categories and to administer all other personnel actions, terms and conditions of employment in a manner that is consistent with equal employment, and does not discriminate on the basis of race, creed, ethnicity, color, national origin, sex, sexual orientation, gender identity, age, religion, disability, medical condition for which a person has been rehabilitated or cured, marital status, family responsibilities, genetic information, political affiliation, personal appearance, matriculation, unemployment status, veteran status, or any other characteristic protected by applicable laws. It is also the institution's policy to recruit, hire, promote, and provide reasonable accommodation to qualified individuals with disabilities and covered veterans who are otherwise qualified.

SALARY & BENEFITS

The National Academies of Sciences, Engineering, and Medicine offers a competitive salary and benefits package.

LOCATION

The National Academies of Sciences, Engineering, and Medicine are located in Washington, D.C.

APPLICATION INSTRUCTIONS

All applications must be accompanied by a cover letter and résumé. Before submitting your materials, please read them over for accuracy. Review of applications will begin immediately and continue until the successful candidate has been selected.

To nominate a candidate, please contact Greg Duyck:
gregduyck@aspingleadershipgroup.com.