



DIRECTOR OF GIFT PLANNING

ROLLINS COLLEGE

Winter Park, Florida

<http://rollins.edu>



The Aspen Leadership Group is proud to partner with Rollins College in the search for a Director of Gift Planning

The Director of Gift Planning is responsible for the strategic leadership and direction of Rollins College's gift planning efforts within the Office of Development. This program generates support from alumni and friends of the college through outright gifts, estate, and testamentary gift commitments. The Director will provide leadership to develop creative marketing efforts designed to effectively and systematically communicate the benefits of gift planning opportunities. Working with fellow fundraising professionals, the Director will lead efforts to identify, cultivate, solicit, record, and steward gifts from prospects whose support can be maximized through gift planning strategies. The Director is responsible for managing and stewarding Rollins' existing planned giving commitments and working with the college's finance office, and the custodian of charitable trusts, gift annuities, and pooled income fund. The Director serves as an internal adviser on federal and state legislation and laws governing or having implications for educational philanthropy.

Rollins College is a four-year, coeducational institution and the first recognized college in Florida. Rollins educates students for global citizenship and responsible leadership, empowering graduates to pursue meaningful lives and productive careers. Rollins is committed to the liberal arts ethos and guided by its values and ideals. Rollins is nationally recognized for its distinctive undergraduate and selected graduate programs and provides opportunities to explore diverse intellectual, spiritual, and aesthetic traditions. It is dedicated to scholarship, academic achievement, creative accomplishment, cultural enrichment, social responsibility, and environmental stewardship. It values excellence in teaching and rigorous, transformative education in a healthy, responsive, and inclusive environment.

For more than 130 years, Rollins has adhered to the belief that college is about learning to think critically and discovering how one individual can positively impact the world. To that end, Rollins strives to enable individuals to see the bigger picture, to understand how areas of knowledge are interrelated, and to view learning as a lifelong endeavor.

Rollins College has been ranked one of the top regional universities in the south in the annual rankings of "Best Colleges," released by *U.S. News & World Report*. For 22 consecutive years, Rollins has been ranked among the top two regional universities in the south and first in Florida. Rollins College was named the number one college in the south by *College Choice* in a ranking based on a nationwide survey of entering first-year students.

REPORTING RELATIONSHIPS

The Director of Gift Planning will report to the Assistant Vice President for Development.

PRINCIPAL OPPORTUNITIES

Rollins College, in the midst of a quiet phase of a campaign, is positioned for a transformational step in its development program. With a dynamic and experienced President, one who brings vision and clarity of purpose to the institution, an experienced Vice President and an Assistant Vice President with much breadth in her fundraising career, the Director can ramp up efforts to systemically engage potential donors, market gift planning vehicles, and team up with major gift officer partners.

Rollins is looking for a leader to imagine the future of an effective gift planning program and bring the skills necessary to create that work with the full support of the President, Vice President, Assistant Vice President, and an experienced major gifts team.

At your disposal is an experienced marketing and communications team that works in tandem with the entire Institutional Advancement team. The Director will find ready partnerships and willing leadership to create a new road map for gift planning, while adding immense value to a campaign currently under-subscribed in planned gifts and a wealth of opportunity among our alumni to close these kinds of gifts.

PRIMARY RESPONSIBILITIES

The Director of Gift Planning will

- manage a portfolio of gift planning prospects, traveling extensively to cultivate, solicit, and steward these individuals;
- identify, cultivate, and solicit donors for gifts of bequest intentions, life income gifts (primarily charitable remainder trusts and charitable gift annuities), and outright gifts;
- identify potential complex gifts (real estate, LLC and partnership interests, etc.) and work with senior leadership to help close those complex gifts;
- prepare and present detailed gift planning proposals to prospective donors and/or their advisors;
- prepare proposals for fundraising staff to present to their prospects;
- with the use of an outside planned giving vendor or in-house resources, develop strategies and content for all gift planning marketing materials;
- develop and maintain expertise in tax, investment, and legal aspects of charitable giving, and articulate this information effectively to donors, their advisors, fundraising staff, and volunteers;
- serve as a source of estate planning and financial planning expertise and education for all fundraising staff; and
- assist in analyzing information on goals and outcomes and provide feedback and make recommendations on plans, actions, and strategies to enhance the planned giving program.

KEY COLLEAGUES



Myrna Bizer

Assistant Vice President for Development

Myrna Bizer comes to Rollins College from the University of Rhode Island, where she served as the Managing Director of Development. For the past 25 years, Myrna has held many positions in diverse leadership and management roles within higher education philanthropy and nonprofit administration, most notably with the University of Rhode Island as Director of Donor Relations during the initial phase of the *Making a Difference Campaign* and Director of Development with the Graduate School of Oceanography. From 2007 to 2013, she was at Brown University, where she was a well-respected member of the development team, serving as Senior Director, Regional Development. For Brown, she oversaw fundraising work in Chicago and Texas, and managed alumni and parent relationships with a select pool of principal level donors throughout the country. Myrna's prior professional experience includes tenures at Stetson University and the Florida West Coast Symphony where she served as Associate Director of Development and Director of Personnel & Production, respectively. She has a B.M. with honors from the University of Missouri. She has a proven track record of major gifts work, as well as experience in annual giving, donor relations, and research.



Laurie Houck

Vice President for Institutional Advancement

As Vice President for Institutional Advancement, Laurie Houck oversees the Development, Corporate and Foundation Relations, Donor Relations, Annual Giving, Alumni Relations, Advancement Services, and Scheduling and Events teams. Prior to Rollins College, Laurie served as Vice President for Development and Alumni Relations at the College of Wooster. During that time, she and her team created and implemented effective fundraising and alumni engagement programs that led to increased giving and volunteer involvement, and built on the strong relationships with and commitment of the Board of Trustees and the Alumni Board. She also led the development team at Whitman College from 2006 to 2011, where she created the architecture for their largest campaign. Prior to Whitman, during her decade-long tenure at the University of Washington, she played a key role in the University's \$2 billion campaign. Laurie holds a B.A. in English from Whitman College and completed coursework at Harvard University's Institute for Educational Management in 2013. She joined the Rollins community in January 2017.



Vicky Medlock

Senior Director of Advancement Services

Vicky Medlock, a 35-year advancement veteran, has enjoyed a rich and diverse advancement background serving higher education (public and private) and association programs. Her experience encompasses gift processing, reporting, prospect research and moves management, donor relations and events, annual giving, finance and operations, board relations, campaign programming, and strategic planning.

Vicky will assume the role of Senior Director of Advancement Services at Rollins College beginning January 2018. She most recently served as the Associate Vice President for Advancement Operations at Augusta University with prior leadership positions at Shenandoah University, University of South Florida, National Rifle Association of America, University of Cincinnati, and the University of Florida.

She is a recipient of CASE's Crystal Apple Award, having taught at numerous conferences, including chairing the Summer Institute in Advancement Services and the Senior Conference for Advancement Services Professionals. Vicky is a past president of the Association of Advancement Services Professionals (AASP) and is an ex officio member of the Board. Vicky was recently honored by AASP as the Volunteer of the Decade 2007-2017.



Grant H. Cornwell, Ph.D.

President

Grant Cornwell took office as 15th President of Rollins College in 2015, following eight years as president of The College of Wooster and 21 years at St. Lawrence University as Vice President and Dean of Academic Affairs, and as a faculty member. Nationally recognized for his work in defining liberal learning in a global environment, he writes regularly about multiculturalism, freedom, diversity, and global citizenship. Cornwell is a member of the Association of American Colleges and Universities' board of directors and chair of the LEAP Presidents' Trust. He is also a member of NAICU's Policy Analysis and Public Relations Committee and the executive committee of Florida Campus Compact, and has served on the Council on Foreign Relations' Global Literacy Advisory Board as well as the board of Teach for America and the American Council on Education's Commission on International Initiatives. He holds a bachelor's degree in philosophy and biology from St. Lawrence, and master's and doctoral degrees in philosophy from the University of Chicago.

CANDIDATE QUALIFICATIONS AND QUALITIES

The successful candidate for the position of Director of Gift Planning should have

- clear knowledge and understanding of planning methodologies and strategies as part of a comprehensive development program;
- knowledge of gift, estate, and financial planning, as well as various planning options including outright gifts, securities, insurance, real estate, and gifts in kind;
- strong interpersonal skills and the ability to clearly communicate gift planning strategies to potential donors;
- ability to work with and relate to professional advisors;
- commitment to excellent job performance and teamwork;
- record of success in fundraising and a willingness to travel and work with potential donors;
- successful solicitation, negotiation, and closing of planned gifts or major gifts of \$100,000.00 or more and building and maintaining of long-term relationships with donors;
- successful experience in managing and tracking multiple prospects and donors and developing strategies;
- highly developed interpersonal skills and the ability to work with a diverse population of donors;

- excellent verbal and written communication skills;
- demonstrated capacity to organize and manage programs;
- ability to work independently and creatively in a collaborative, busy, team-oriented environment;
- knowledge of PG Calc software (preferred); and
- ability to represent Rollins' interests while interacting with alumni, parents, friends, and staff of the college, and an understanding of the culture of a small, highly selective, residential liberal arts institution.

A bachelor's degree is required for this position as is 5 years of gift planning experience in higher education. An advanced degree is preferred.

SALARY & BENEFITS

Rollins College offers a competitive benefits package. As a Rollins College employee, one can take advantage of benefits and opportunities which will enhance the quality of one's life, provide protection for a variety of circumstances, help one prepare for your future, aid in personal and professional growth, and help maintain balance in one's work and family life.

LOCATION

This position is based in Winter Park, Florida, an attractive and historic residential community adjacent to the city of Orlando. Rollins' award-winning campus is situated on the shores of beautiful Lake Virginia and adjacent to the first-class dining, shopping, and entertainment options of Winter Park's famous Park Ave. Rollins College was ranked the No. 1 Most Beautiful Campus by The Princeton Review's *The Best 380 Colleges*.

DIVERSITY AND INCLUSION

Rollins' campus community is not only a reflection of the diversity of race, heritage and culture found in its backyard, but an extension of the good in the world that comes from respecting and celebrating differences.

APPLICATION DEADLINE

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 Tim Child, timchild@aspenleadershipgroup.com.

All inquiries will be held in confidence.

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