

# ASPEN LEADERSHIP GROUP

**DIRECTOR OF GIFT PLANNING  
PENNSYLVANIA STATE UNIVERSITY**  
State College, Pennsylvania  
<http://psu.edu>



The Aspen Leadership Group is proud to partner with the Pennsylvania State University in the search for a Director of Gift Planning.

Penn State's Office of Gift Planning, the central office responsible for the cultivation, solicitation, design, and administration of planned gifts, helps the University's supporters achieve their philanthropic and financial goals and secures \$90 to \$100 million each year in planned gifts for the University. As Penn State begins a new strategic fundraising campaign, *A Greater Penn State for 21<sup>st</sup> Century Excellence*, a highly experienced and motivated gift planning specialist is needed to work in close collaboration with both gift planning and fundraising colleagues. The Office of Gift Planning is experienced in gift planning and understands the importance of philanthropy as a part of a successful overall estate plan. It is available to assist donors and their advisers as they consider the many opportunities available. Its goal is to present donors with options and to help them make the best choice possible. It accomplishes this by ensuring that gifts express donors' interests in the University, and maximize the benefits the donor and the University receive from the gift.

Penn State encompasses twenty-four campuses; 17,000 faculty and staff; 100,000 students; a teaching hospital with one million patient visits a year; over one-half million active alumni; an online World Campus that empowers anyone to pursue an education—anytime, anywhere; and the largest student-run philanthropic organization on the planet. Penn State teaches students that the real measure of success is what one does to improve the lives of others, and they learn to be hard-working leaders with a global perspective. Penn State conducts research to improve lives. It adds millions to the economy through projects in Pennsylvania and beyond. It helps communities by sharing faculty expertise and research.

Penn State's campuses are located from one side of Pennsylvania to the other. Through Penn State World Campus, students can take courses and work toward degrees online from anywhere on the globe that has Internet service. Penn State support students in many ways, including advising and counseling services for school and life; diversity and inclusion services; social media sites; safety services; and emergency assistance. Penn State's network of more than a half-million alumni is accessible to students when they want advice and to learn about job networking and mentoring opportunities as well as what to expect in the future. Through its alumni, Penn State lives all over the world.

The best part of Penn State is its people. Its students, faculty, staff, alumni, and friends in communities near its campuses and across the globe are dedicated to education and fostering a diverse and inclusive environment.

## **REPORTING RELATIONSHIPS**

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

## **THE OFFICE OF UNIVERSITY DEVELOPMENT**

At Penn State's Office of University Development (OUD), everyone matters. As a member of the team, one can play an integral role in one of the most respected and successful fundraising operations in the country. OUD's frontline fundraisers come not only from the higher education and nonprofit sectors, but also from the worlds of business, law, and other fields, bringing diverse experiences and insights to the conversation.

OUD offers trainings and seminars on everything from proposal writing to stewardship to making sure team members continue to learn and progress professionally. It also has an extensive mentoring program to help build relationships between its senior leadership and development team members at every stage of their careers. OUD wants everyone to feel valued and respected, and it wants to provide the tools needed to improve performance and contribute to success.

The University is launching a new effort driven by an inspired vision for the future: *A Greater Penn State for 21st Century Excellence*. As a member of the development team, the Director of Gift Planning will be on the front lines in gathering donor support for the imperatives of this campaign.

## **PRINCIPAL OPPORTUNITIES**

Penn State's Office of Gift Planning helps the University's supporters achieve their philanthropic and financial goals and secures \$90 to \$100 million each year in planned gifts for the University. As Penn State begins a new strategic fundraising campaign, *A Greater Penn State for 21<sup>st</sup> Century Excellence*, a highly experienced and motivated Director of Gift Planning is needed to manage a personal portfolio not to exceed 75 relationships while working in close collaboration with both gift planning and major gifts colleagues to create, guide, and implement gift planning strategies for individual prospects and assigned units across the University.

Michael J. Degenhart leads the office and oversees the development and implementation of planned giving efforts across the University's twenty-four campuses. Widely considered a leader in his field, he has been quoted in and authored articles for such publications as *Bloomberg Wealth Manager* and *The Chronicle of Philanthropy*.

Guided by principles of collaboration and service, the Office of Gift Planning enables donors to earn income, pay fewer taxes, secure their retirement, and create a personal legacy while helping to ensure that Penn State remains a global leader in higher education for generations to come.

## PRIMARY RESPONSIBILITIES

The Director of Gift Planning will

- create, guide, and implement gift planning strategies for individual prospects and assigned units across the University;
- manage a personal portfolio of prospects not to exceed 75 relationships and solicit planned gifts in collaboration with other University staff;
- establish and implement the strategic direction of gift planning programs with assigned liaison units and with individual prospects;
- manage the identification, qualification, cultivation, solicitation, and stewardship of gift planning prospects while ensuring the application of appropriate policies and best practices;
- personally maintain a portfolio of prospects and complete, in person and in partnership with development colleagues, a minimum of nine gift planning solicitations at the \$100,000 level and higher;
- maintain and enhance stewardship for all gift planning donors and promote the Atherton Society and its events as recognition for these donors;
- inform all of these activities with a comprehensive, up-to-date understanding of complex outright gifts, life-income and estate gifts, family wealth planning, and multigenerational strategies to secure transformational gifts;
- lead educational seminars for fundraisers and collaborate in the creation of marketing materials for donors that highlight gift planning opportunities; and
- promote and enhance stewardship of all Penn State gift planning donors.

## KEY COLLEAGUES



**O. Richard Bundy III**

**Vice President for Development and Alumni Relations**

In his role as Penn State's Vice president for Development and Alumni Relations, Rich Bundy leads a team of more than 400 staff in advancing the University's land-grant mission through the engagement of Penn State's alumni and friends. He assumed the helm in January, as Penn State begins a new, University-wide fundraising campaign, *A Greater Penn State for 21st Century*

*Excellence.*

Rich's nearly twenty-five-year career in public higher education fundraising and alumni relations began at Penn State, and it has since included posts at Michigan State, Iowa State, and, most recently, the University of Vermont Foundation, where he served as the inaugural President and Chief Executive Officer.

He holds BA and MA degrees from Penn State and an MBA from Michigan State, and he attended the Management Development Program at Harvard's Graduate School of Education. He served on the Board of Directors of the National Agricultural Alumni & Development Association (NAADA) from 2003-2006, and hosted their national conference in 2005. Rich is the recipient of the 2006 NAADA Professional Achievement Award and the 2006 ISU Foundation Governor's Award. He co-hosted the Council for the Advancement and Support of Education (CASE) national conference on Campaign Planning in 2014.

A native of Pennsylvania, Rich is an avid runner and has successfully completed thirty-two marathons, including six finishes at the prestigious Boston Marathon and all six of the World Marathon Majors.



**Mike Degenhart**  
**Assistant Vice President for Gift Planning**

Michael Degenhart is currently serving as the Assistant Vice President of the Office of Gift Planning at The Pennsylvania State University, where he is responsible for the development and implementation of University-wide planned giving efforts for Penn State's 24 campuses. At Penn State, Michael and his office are tasked with an overall combined gift planning goal of \$100 million annually. He is a key member of the senior management team that directed Penn State's \$2 billion *For the Future* campaign and its current \$1.6 billion *Greater Penn State* campaign.

Preceding this position, Michael served as an Assistant Vice President at Syracuse University and spent seven years in the Office of Trust, Estates and Gift Planning at Cornell University.



**David McGoron**  
**Associate Director of Gift Planning Administration**

David McGoron is the Associate Director of Gift Planning Administration at the Pennsylvania State University. He leads the gift planning administration team, working with the management of life income gifts, bequest commitments, realized bequest gifts as well as gifts of life insurance and gifts in-kind. Before joining Penn State in 2015, David worked in

private practice and focused primarily on school law and labor and employment issues. He earned his BA in Philosophy from The Ohio State University and his JD degree, with high distinction, from the Ohio Northern University, Pettit College of Law.



**Pat Roenigk**  
**Senior Director of Gift Planning**

Patricia Roenigk is the Senior Director of Gift Planning at the Pennsylvania State University. She received a Bachelor of Arts from Penn State and her Juris Doctorate from the Temple School of Law. Ms. Roenigk, who formerly served as the Director of Individual Gift Planning and the Director of

Planned Giving and Endowments, works with the University's wealthiest benefactors and on the most complex gift plans. Ms. Roenigk has previously presented at the National Planned Giving Conference and PPP. She has authored articles for the *Journal of Gift Planning* and *Planned Giving Today*.

## **CANDIDATE QUALIFICATIONS AND QUALITIES**

The ideal 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;
- ability to understand and communicate about complex gift planning issues, including estate and wealth management and tax regulations;
- 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; and
- knowledge of PG Calc software (preferred).

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

## **SALARY AND BENEFITS**

Pennsylvania State University boasts many benefits for its employees and their families, including competitive salaries, retirement and healthcare packages, tuition discounts, and generous holidays, vacation, and sick time.

## **LOCATION**

Routinely ranked among the best places to live in the country, State College and the surrounding areas provide a safe environment and public school system for family and outdoor recreation in a breathtaking landscape, collegiate athletics and world-class entertainment venues, and a vibrant social scene for all ages. This ultimate college town offers short commutes and work-life balance. The community reflects both the diversity of a global Research 1 university and the warmth and small-town feel of a region where people get to know their neighbors and put down roots for generations.

## DIVERSITY AND INCLUSION

In the fall of 2016, at the request of a dedicated group of students, Penn State launched a University-wide initiative called “All In at Penn State: A Commitment to Diversity and Inclusion.” The initiative’s mission is to raise awareness about equality within the community and create an open-minded space for *all* Penn Staters—regardless of race, gender, ethnicity, religion, ability, orientation, or opinion. The University believes that it can learn from each other’s differences and break down barriers. Penn State strives to be an inclusive and welcoming home for all students, faculty, staff, alumni, and friends—it’s a place where everyone can be themselves, together.

## 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, contact Greg Duyck: [gregduyck@aspenleadershipgroup.com](mailto:gregduyck@aspenleadershipgroup.com).

*All inquiries will be held in confidence.*

