



Director of Planned Giving Position Information

George Mason University is seeking a Director of Planned Giving for their Advancement & Alumni Relations team. The Director will hold primary responsibility for gifts of estates, trusts, and various other financial venues that reflect financial planning and deferred giving opportunities. They will work collaboratively with the additional Development senior staff and colleagues across the University.

George Mason University: About Mason

George Mason University is an innovative, entrepreneurial institution with national distinction in academics and research. Mason holds a top U.S. News and World Report “Up and Coming” spot for national universities and is recognized for its global appeal and excellence in higher education.

Mason is currently the largest and most diverse university in Virginia, with students and faculty from all 50 states and over 135 countries studying in over 200 degree programs at campuses in Arlington, Fairfax, Prince William, and learning locations across the commonwealth. Rooted in Mason’s diversity is a campus culture that is rewarding and exciting, meaningful work, and opportunities to collaborate and create.

Located near Washington D.C., one of the most important political, economic, and intellectual hubs in the world, the University accepts its responsibility to serve others: to help students succeed, enrich the life of the community, and contribute to solving some of the most complex global problems of our time. George Mason University has [10 schools and colleges](#) devoted to a variety of areas of study and was also the first university in the country to offer doctoral programs in conflict resolution, information technology, bioinformatics, and computational social science.

George Mason University: Values

- *Our students come first* - Our top priority is to provide students with a transformational learning experience that helps them grow as individuals, scholars, and professionals
- *Diversity is our strength* - We include and embrace a multitude of people and ideas in everything we do and respect differences
- *Innovation is our tradition* - We strive to find new and better ways to deliver on our mission while honoring time-tested academic values
- *We honor freedom of thought and expression* - We protect the freedom of all members of our community to seek truth and express their views
- *We are careful stewards* - We manage the economic and natural resources entrusted to us responsibly and sustainably

- *We act with integrity* - We hold ourselves to the highest ethical standards as educators, scholars, students, and professionals
- *We thrive together* - We nurture a positive and collaborative community that contributes to the well-being and success

Governance

George Mason University is governed by its 16-member [Board of Visitors](#), a corporate body serving under the leadership of a rector, vice-rector, and secretary. The governor of Virginia appoints the members of the board on a rotating basis to serve four-year terms. The Faculty Senate Chair sits on the Board as a nonvoting faculty representative. As a result of their respective elections to the positions of president of the Student Government and president of the Graduate and Professional Student Association, two non-voting student representatives are appointed by the Board of Visitors each year at the May meeting to serve a one-year term.

Resource Development at GMU

Mason's Advancement & Alumni Relations office and the George Mason University Foundation are responsible for all aspects of fundraising for the University, including the successful discovery, cultivation, solicitation, and stewardship of all donors.

The George Mason University Foundation

The [George Mason University Foundation](#), Inc., founded in 1966, is a 501(c)(3) nonprofit, independent foundation and a private corporation organized and operated for the benefit of George Mason University to receive, manage, invest, and administer private gifts and resources. The [endowment](#) represents the generosity and vision of donors and stewards who, by investing in George Mason University through the foundation, help ensure financial stability for Mason. Income from these funds provides perpetual support for Mason's schools and colleges, students, faculty, and programs. As of June 30, 2021, the endowment's total value was \$189.2 million, a 22 percent increase over the previous year. The endowment's return for the fiscal year 2021 was 23.27 percent. The endowment's payout to support University activities was \$4.9 million, an increase of \$1.3 million over the prior year.

President of the George Mason University Foundation and Vice President for Advancement and Alumni Relations

Trishana E. Bowden joined George Mason University in March 2019 as the Vice President for Advancement and Alumni Relations and President of the George Mason University Foundation.

As the Vice President for Advancement and Alumni Relations and President of the Foundation, Trishana reports jointly to the President of the University and the Foundation Board of Trustees, working harmoniously with a multitude of highly engaged and energetic university and foundation partners. She is responsible for developing, executing, and evaluating all aspects of the University's comprehensive fundraising program, including annual giving, major and leadership giving, corporate and foundation relations, planned giving, alumni relations, research and prospect management, development services, and donor cultivation and stewardship.

Trishana provides the vision and direction for University Advancement with a clear focus on future fundraising after the completion of the record-setting *Faster Farther* campaign, which concluded in December 2018. She also provides strategic leadership and direction for post-campaign analytics, reporting, and follow-up. She works with key leadership to develop clear priorities and future support plans through pipeline development, alumni engagement, and participation strategies.

Bowden came to Mason from Goucher College in Towson, Maryland. She was the Vice President for Advancement, responsible for providing strategy, leadership, direction for fundraising, alumni and parent relations, campaign planning, and implementation. Her accomplishments included diversifying and strengthening Goucher's donor base and pipeline to build a culture of philanthropy, which led to a doubling of overall giving to the institution in less than three years.

Before her work at Goucher, Trishana was the Associate Dean for External Relations at the University of Maryland's Francis King Carey School of Law. She also served as Associate Dean for Institutional Advancement at American University Washington College of Law and has held development positions at the American Lung Association of Maryland and the Johns Hopkins Oncology Center. She received a B.S. in Mass Communication/Media Studies from Towson University in 1991.

Office of Advancement & Alumni Relations

Advancement's mission is to build strong, lifelong relationships with George Mason University's alumni and constituents while matching their philanthropic interests with the University's aspirations and priorities. The division is committed to serving the needs of the University, our alumni, and the greater community by providing access to quality education and lifelong learning. Respect, service, integrity, collaboration, diversity, transparency, and creativity are the values that guide our work and culture.

The University Advancement division is a comprehensive development and alumni relations enterprise with a staff complement of approximately 135 full-time employees. Advancement's functional units include development/fundraising, alumni relations, stewardship and donor relations, advancement communications, special events, gift processing, research, prospect management, gift planning, corporate and foundation relations, information systems and management, and infrastructure services.

Faster Farther: The Campaign for George Mason University

George Mason University has gone farther, faster, than any other university. The University has pushed boundaries in fields ranging from music to medicine, and this is only the beginning of what Mason hopes to achieve. The *Faster Farther* campaign, intended to bring in \$500 million raised over \$690M raised from 2008 - 2018. Over 73,000 donors gave and yearly giving doubled from \$30.5M to \$72.3M in the 10-year campaign. Significant achievements were made in research funding (\$362.8M), student scholarship and support (\$93.1 M), and for facilities (\$32.5M).

The Position

The Director of Planned Giving will report to the Associate Vice President of Development, Central and Units. They will serve as a fundraising liaison to several University areas. They will prepare written materials, including having primary responsibility for training and support for other staff members

working with donors on deferred and planned gifts such as trusts, charitable annuities, life insurance, wills, and bequests.

Duties include:

- Implement short- and long-term planned giving goals and strategies to build upon existing commitments and expand the current donor base pipeline to support George Mason University.
- Support the overall long-term financial strength and endowment of the University by visiting with donors and prospective donors about a variety of gift possibilities, particularly deferred and planned gifts.
- Carry and manage a portfolio of planned giving donors and prospects for cultivation, solicitation, and stewardship.
- Provide expertise in structuring complex gifts and working with colleagues to close new planned gift intentions.
- Enhance donor gift planning and giving by remaining current in areas of gift possibilities available at George Mason University and the current laws and regulations governing such gifts.
- Create positive donor relations by assuming primary responsibility for providing technical support and options regarding planned and deferred gifts.
- Provide support to Development staff, University leadership, and GMUF by offering seminars on planned and deferred gifts to members of the professional staff.
- Help the University meet fundraising goals by thoroughly understanding current capital projects; needs for endowments, gifts, and giving programs available at Mason; and the advantages of membership in various gift recognition societies.
- Manage multi-channel marketing and communications efforts to promote planned giving to prospective donors and help build a robust pipeline of donors and prospects.
- Collaborate with colleagues across Advancement & Alumni Relations and the Annual Giving team to develop a strategic, comprehensive approach to generating planned gift support for Mason, leveraging donors from both the mid-level and direct response program.
- Oversee effective handling and processing of estate gift administration to ensure appropriate stewardship and closure of realized gifts.
- Assist with managing the internal budget, track all invoices/expenses, provide regular updates to the Associate Vice President, and manage vendor relationships.
- Direct and oversee stewardship and recognition programs for planned giving donors and ensure effective regular communication and retention.

Required Qualifications:

- Bachelor's degree required;
- 5-10 years of experience in planned giving fundraising for nonprofit organizations;
- Proven success in closing traditional and complex planned gifts, including but not limited to: bequests, gift annuities, remainder trusts, and gifts of real estate;
- Thorough understanding of current laws and regulations pertaining to fundraising especially planned gifts;
- Exceptional interpersonal skills with all age groups;
- Must have demonstrated written, oral, and listening skills with the ability to communicate effectively with donors and staff;
- Organizational skills, particularly planning, managing deadlines, and evaluating progress;

- The position is paperwork-intensive and requires skills in proofreading and editing, attention to detail, and follow-through;
- Must be knowledgeable of industry trends and best practices for marketing and communicating with gift planning audiences;
- Demonstrated ability to manage multiple projects and deadlines while maintaining disciplined adherence to program goals;
- Demonstrated promotion of a collaborative fundraising culture and strong work ethic;
- Ability to maintain professionalism while completing responsibilities in a precise, dedicated, and flexible manner;
- Possess a positive, enthusiastic attitude as well as proven success as a strong, diplomatic mentor;
- Strong moral character and ethical behavior;
- Proficiency with Microsoft Office Suite; and
- Proficiency with CRMs and generating reports.

Preferred Qualifications:

- Advanced degree;
- Campaign experience.

Nominations and Applications

Review of application materials will begin immediately and continue until the position is filled. All requests for information, written nominations, confidential inquiries, and all application materials should be directed in confidence to:



Susan VanGilder, Managing Director
 Kenna Boyd, Managing Associate
 Storbeck Search
GMUPlannedGiving@storbecksearch.com

For full consideration, applicants must also apply for position number **FA869z**. at <https://jobs.gmu.edu/>

For more information on George Mason University, please visit <http://www.gmu.edu/>

George Mason University is an equal opportunity/affirmative action employer committed to promoting inclusion and equity in its community. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, gender identity, sexual orientation, national origin, disability, or protected veteran status.