

GIFT PLANNING ASSOCIATE

The Opportunity

Located in Portland, Oregon, the Oregon State University Foundation is recruiting for a Gift Planning Associate to join our Gift Planning team.

Position Summary

Reporting to the Assistant Vice President for Gift Planning, this position will coordinate the daily operations of the gift planning programs and will provide programmatic and administrative assistance and support to the gift planning staff and to Development Officers working on planned gifts.

Major Duties

Inquiries - process, facilitate, respond to as directed and monitor all inquiries to the Gift Planning Office including but not limited to all public-initiated inquiries via mail, telephone, email and website; estate gifts (including transfer/pay on death arrangements); and inquiries from development officers.

Data management – input, update and report data. Special emphasis needed on proactively advising the Assistant Vice President on proposal deadlines, next steps, etc. Tools to be used include inquiry tracking spreadsheet; proposal and task tracking in Advance; Benton Hall Society (legacy society) database (with eventual data conversion to Advance); stewardship metrics; planned gift prospect and pipeline reports for Development Directors; quarterly progress reports for monthly development meetings.

Document production – working closely with the Assistant Vice President of Gift Planning and the Associate Director of Gift Planning, prepare planned gift proposals for appropriate internal and legal review, including gift agreements, sample bequest language, gift illustrations, and modeling financial projections. Assist in preparation of necessary Gift Agreements and Statement of Intent documents for planned gifts.

Work flow - coordinate operations work flow and processes to maximize efficiencies and responsiveness. Serve as the hub for all critical information pertaining to the Gift Planning operations. Administer estate gifts; ensure timely and accurate communication with attorneys, trustees and personal representatives; assist with execution of planned gift documents including Charitable Remainder Trusts, Charitable Gift Annuities, Retained Life Estate agreements, etc.; assist with asset transfers associated with planned gifts including securities transfers and real estate transactions.

In conjunction with Finance office, assist with on-going real estate administration and disposition issues.

In conjunction with Assistant Vice President for Gift Planning, provide staff support to Fixed Asset Committee including document production, meeting arrangements, and agendas/minutes.

Independently research and prepare correspondence and reports on behalf of the Assistant Vice President for Gift Planning with minimal oversight.

Progress reports - assist with peer survey data collection/reporting (i.e., Kaspick & Co. comparative statistics report and annual benchmarking survey; Planned Giving Pacific annual peer survey). Assist Assistant Vice President for Gift Planning in producing requested progress reports for Gift Planning Office supervisor and/or other Foundation leaders.

Post-gift stewardship and administration - coordinate production and distribution of acknowledgement letters and materials in conjunction with the gift planning administrative assistant; provide the Foundation's finance office with necessary gift planning information for Foundation's annual audit and gift annuity registration processes; coordinate periodic production and distribution of beneficiary reports and tax return information in conjunction with gift planning administrative assistant.

Marketing and outreach efforts - assist in identifying marketable donors/gifts; assist with training material preparation, production and distribution; coordinate seminar arrangements and staff seminars as directed by Assistant Vice President for Gift Planning.

Minimum Requirements

Bachelor's degree or paralegal degree and five years of progressively responsible experience as an Administrative Assistant or Paralegal. Education and experience equivalencies will be considered. Must be able to travel occasionally and to work occasional overtime hours, including some evenings and weekends. Valid Oregon Driver's License required.

Compensation and Benefits

Annual salary range of \$38,400 - \$48,000. To learn more about our benefits go to osufoundation.org/employment/benefitsoverview.

To Apply

Interested parties should send cover letter and resume to osuf.hr@oregonstate.edu. Fran Judy, Sr. HR Coordinator, OSU Foundation, 850 SW 35th Street, Corvallis, Oregon, 97333. Fax 541-737-9962. This position will be open until filled.

The OSU Foundation makes hiring decisions on the basis of merit and encourages all qualified individuals to apply.

