



Associate Director for Estate, Trust, and Gift Planning

Bucknell University, a dynamic and highly successful private liberal arts university in Lewisburg, Pennsylvania, is seeking a self-motivated, collaborative, inclusive, and detail-oriented Associate Director for Estate, Trust, and Gift Planning.

The Position: Reporting to the Director of Estate, Trust, and Gift Planning and Sr. Philanthropic Advisor, the Associate Director is responsible for supervising two regional Gift Planning Officers, providing expertise on gift planning strategies, managing regionally based portfolios of prospects and donors, as well as partnering with other Development team members and their respective portfolios. This individual will provide strategic direction to the Gift Planning Officers to increase the overall effectiveness of the team. This position is responsible for the cultivation, solicitation, and securing of deferred and outright gift commitments for the University with a focus on blended gifts.

With Bucknell having completed its most recent \$500 million campaign in 2017, the Associate Director will play an integral role in upcoming campaign efforts. They will lead, inspire, and manage their staff to increase planned and blended gift solicitations and closures through their own portfolio work and in collaboration with development officers within their region; advise gift planners and development officers about gift planning options and techniques, complex gift advice, and tax implications; build relationships and work closely with prospects and donors through the cycle of identification, cultivation, solicitation, and stewardship with a focus on blended gifts; partner with donors and their professional advisors to establish, facilitate, and close creative and complex gifts including non-liquid and alternative assets; and promote the University's fundraising priorities through excellent working relationships with faculty, senior academic leaders, trustees, University volunteers, and colleagues. University advancement at Bucknell is dedicated to the values of leading with integrity, embracing a collaborative and inclusive spirit, being open and receptive, nurturing creativity and innovation, and fostering a culture of empowerment and knowledge.

The Institution: Bucknell was established in 1846 as the University at Lewisburg, the nation's 100th college or university in order of founding. It was renamed in 1886 in honor of William Bucknell, a major benefactor. Over the years, the University has steadily evolved from a local institution to a highly visible national institution, pushing the boundaries of undergraduate

education. The institution has a distinct mix of liberal arts and professional programs, giving students almost unlimited options to pursue their intellectual interests and passions. The 3,747 undergraduates and 40 graduate students are drawn from most states and 52 countries, including 20 percent who are students of color and five percent from abroad. Bucknell University awards Bachelor of Arts and Bachelor of Science degrees in more than 50 fields, including nine interdisciplinary programs: animal behavior, cell biology/biochemistry, comparative humanities, mathematical economics, environmental studies, international relations, Latin American studies, neuroscience, and women's & gender studies. Approximately 63 percent of the students are enrolled in the College of Arts & Sciences, 19 percent in the College of Engineering, and 18 percent in the Freeman College of Management. Professional and preprofessional programs in the College of Engineering and the Freeman College of Management do more than coexist with the liberal arts and sciences. All of these programs operate with excellence and often function synergistically to enhance the intellectual transformation of students. Bucknell includes both independent and collaborative learning, as well as focused study in international and modern culture and issues, as cornerstones of the undergraduate experience. About 45 percent of each graduating class has studied abroad in approved programs in Europe, the Middle East, Africa, Asia, South and Central America, Australia, New Zealand, and Canada.

The faculty's strong relations with students is credited as an important component for Bucknell's extraordinary graduation rates, which annually rank among the highest few in the nation. Employment and graduate school placement figures are also very high. Bucknell's additional assets include a \$1.07 billion endowment, total operating expenses of \$252 million, and a network of more than 56,000 alumni throughout the nation and the world. The 450-acre campus is among the most attractive in the country. Of note are the highly regarded Ellen Clarke Bertrand Library (1951), the handsome Weis Center for the Performing Arts (1988), the capacious Rooke Science Center (1991), the Weis Music Building (2000), the Breakiron Engineering Building (2004), the LEED Silver-certified Academic West (2013), and the LEED Silver-certified Hildreth-Mirza Hall (2018). In all, there are 14 LEED-certified buildings.

Qualifications: The successful candidate will have demonstrated successful management and supervisory experience; creativity and broad-level strategic thinking; and exceptional customer service skills with the ability to build relationships and communicate complex ideas, thoughts, and facts clearly, effectively, and persuasively both verbally and in writing. The ability to comprehend sophisticated financial and legal concepts, understand technical material of complex gift plans, and remain current with changing legal and tax arenas affecting planned giving is required. Also required is a bachelor's degree and seven years of experience in gift planning, legal, or a comparable field—or an equivalent combination of education and work experience—along with three years of demonstrated fundraising success related to complex gifts. Preferred qualifications include an advanced degree or designation; demonstrated success in securing six-figure major gifts, specifically in planned giving; and experience in higher education.

Location: Bucknell University is located in Lewisburg, Pennsylvania, a historic small town in scenic central Pennsylvania bordered by the Susquehanna River. Most of the mid-Atlantic region's major cities are within three- or four-hour drives, including New York, Philadelphia, Baltimore, Pittsburgh, and Washington, D.C. The heart of Lewisburg is its historic downtown, with beautifully preserved Victorian homes and streets filled with restaurants, boutiques, and coffee shops. Bucknell's three-story downtown bookstore is one of the many connections the University has with Lewisburg. The walk from downtown to the University, in the light of the borough's signature streetlamps, evokes the sense of an earlier, calmer America. The balance of not being stuck in traffic, while not running out of things to do, creates a relaxed and vibrant environment. Lewisburg also is ranked among the nation's "most livable" small towns based on key resources such as health care, safety, and the economic base.

Application: Interested candidates should submit application materials to Bucknell University directly through the [University Portal](#). For a confidential discussion about this opportunity, please contact Melissa M. Diehl, Director, Estate, Trust and Gift Planning and Senior Philanthropic Advisor, at mmdiehl@bucknell.edu. Review of candidates will continue through January 10, 2024.

Bucknell University does not discriminate on the basis of race, color, national origin, sex, disability, religion, age, veteran status, gender identity, marital status, sexual orientation, gender expression or any characteristic protected by law, in its educational programs and activities, admissions, or employment, as required by Title IX of the Educational Amendments of 1972, the Americans with Disabilities Act of 1990, Section 504 of the Rehabilitation Act of 1973, Title VII of the Civil Rights Act of 1964 and other applicable laws and University policies.



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