

# **Assistant Vice President for Gift and Estate Planning at Augusta University in Georgia**

**Augusta University**, a highly respected, comprehensive public research institution and premier medical center of the University System of Georgia, announces a national search for the **Assistant Vice President for Gift and Estate Planning**. Applications and nominations are being accepted.

Complete information is in the **Search Profile** at  
<http://www.myersmcrac.com/skins/userfiles/files/AU-AVPGEP.pdf>

## **The Opportunity**

Augusta University (AU) is dedicated to educating the next generation of innovators, leaders, and health care providers. With locations throughout Augusta and at satellite campuses across Georgia in Athens, Albany, Rome, and Savannah, AU offers undergraduate programs in the liberal arts, sciences, business, and education, in addition to a full range of graduate programs and hands-on clinical research opportunities. At the forefront of groundbreaking research focused on improving and enriching the human experience, the University is Georgia's innovation center for education and health care. AU provides a tobacco-free learning and work environment.

AU's Office of Advancement establishes and cultivates relationships with alumni, friends, and the campus community to encourage support for the University, its students and programs to accomplish its mission and achieve its vision. The Advancement staff engages the institution's many stakeholders, securing private support through a donor-centered approach. The office stewards and manages gifts, fosters community outreach, and shares the University's story to strengthen the institution and advance its goals.

The Office of Advancement is comprised of seven units: Central Office; Advancement Operations; Alumni Affairs; Annual Giving; Foundations, Finance, and Accounting; Major Gifts and Campaigns; and Major Gifts - Medicine. Since FY 2014, fundraising for the University has totaled more than \$97.8 million. In 2013, Augusta University received from Dr. J. Harold Harrison, a 1948 graduate of the Medical College of Georgia, a gift in excess of \$66 million, one of the largest gifts to a public university in Georgia.

The University has three affiliated foundations: Augusta University Foundation, Georgia Health Sciences Foundation, and Medical College of Georgia Foundation.

Under the leadership of Deborah Stafford Vaughn, who joined the University in 2018 as Vice President for Development, AU plans to launch its first comprehensive fundraising campaign in its history. This is the ideal time for a proven and highly motivated individual to serve as the Assistant Vice President (AVP) for Gift and Estate Planning at AU.

## **Responsibilities of the Position**

The AVP will join the committed and focused team of 34 professionals and will be a key member of the Advancement Leadership team, contributing to the success of an ambitious comprehensive campaign. Responsibilities will include generating support from donors through testamentary bequests, charitable trusts, life income, and other gifts of a complex nature, such as real estate and closely held securities.

In addition to personally managing a portfolio of philanthropic prospects, the AVP will provide guidance, leadership, and/or consultation on potential planned gifts to development partners in the Office of Advancement and its affiliated foundations.

### Additional Responsibilities

- Create, with the Vice President for Development, a strategic plan with measurable goals and objectives, sound business practices, and proven tactics to secure planned gifts.
- Identify, qualify, and personally manage a portfolio of up to 100 individual major/planned giving prospects.
- Build and maintain relationships with physicians and medical staff to identify new grateful patient donors.
- Develop and execute strategies to cultivate and solicit qualified prospects for major and planned gifts, both independently and in collaboration with other AU development staff and AU and AU Health faculty and staff.
- Cultivate relationships with attorneys, trust officers, accountants, financial planners, and other estate planning professionals regarding gift opportunities for clients; develop and engage a volunteer group of advocates from the aforementioned industries; provide material for their use, exchange up-to-date information on best practices, request help in obtaining referrals, and discuss donor interests.
- Serve as an institutional expert on planned giving vehicles, tax-wise philanthropy, and current laws and trends related to them.
- Conduct occasional trainings and information sessions regarding best planned giving practices with development colleagues and other AU faculty and staff.
- Respond to inquiries and meet with prospects, existing donors, community members, and their advisors in one-on-one or group settings, as requested.
- Design and implement a broad-based, proactive marketing plan to inform, educate, and identify prospective planned giving prospects on various planned giving vehicles.
- Respond to inquiries and meet with prospects, existing donors, community members, and their advisors in one-on-one or group settings, as requested.
- Manage and lead others in securing planned gifts and provide motivation and guidance for optimum results.

### Requirements for the Position

The successful candidate will possess exceptional leadership qualities and be able to work cooperatively and collaboratively with multiple internal and external constituents. Integrity, honesty, and a strong work ethic are essential to this position. An advanced degree and fundraising experience in a health care or higher education setting are preferable. A juris doctorate degree or a CPA license is desired.

#### Knowledge and abilities:

- Knowledge and demonstrated experience in planned gifts and estate planning to successfully fulfill the responsibilities
- Ability to understand and work within a complex academic medical center and comprehensive university
- Experience at successfully managing priorities and strategically focusing on outcomes to ensure the highest return on investment
- In-depth and current knowledge of the laws and regulations related to charitable giving and charitable gift planning, including testamentary gifts, life income gifts (charitable remainder trusts), testamentary

substitutes, retirement funds, deductibility issues, gifts of real property, investment vehicles, pledge rules, etc.

- Ability and commitment to provide prompt responses to gift planning inquiries from donors and/or their advisers, engage in conversations with donors, and furnish clear and understandable written explanations, gift illustrations, and gift agreements as needed
- Excellent written and verbal skills and interpersonal skills
- Commitment and ability to maintain confidentiality
- Ability and willingness to travel and work outside standard office hours

## **Augusta University**

Founded in 1828, Augusta University is a public research university and medical center dedicated to training the next generation of innovators, leaders, and health care providers. The combination of nationally ranked business and nursing schools as well as the state's flagship public medical school and only dental school makes AU a destination of choice for the students of today and the leaders of tomorrow. The university is Georgia's innovation center for education and health care.

Home to the Medical College of Georgia, the nation's 9th-largest and 13th-oldest medical school, the university's Health Sciences Campus is at the forefront of health care innovation. Located in downtown Augusta, the Health Sciences Campus houses the state's largest College of Nursing; the comprehensive College of Allied Health Sciences; The Graduate School; the state's only dental school, The Dental College of Georgia; and the state's only public academic medical center.

Augusta University Health is a world-class health care network, offering the most comprehensive primary, specialty and subspecialty care in the region. Augusta University Health provides skilled, compassionate care to its patients, conducts leading-edge clinical research and fosters the medical education and training of tomorrow's health care practitioners. Augusta University Health is a not-for-profit corporation that manages the clinical operations associated with the university.

In addition to providing care in the Augusta area, Augusta University Health physicians travel to satellite practice sites throughout Georgia, illustrating AU's commitment to care for people across the state and region. Augusta University Health is a thriving academic health center that also is affiliated with Children's Hospital of Georgia and the Georgia Cancer Center.

The historic Summerville Campus is home to AU's liberal arts curriculum. In the shade of ancient trees, professors from the Katherine Reese Pamplin College of Arts, Humanities, and Social Sciences; the James M. Hull College of Business; the College of Education; and the College of Science and Mathematics prepare students for a lifetime of critical thinking, creativity, and entrepreneurial success.

AU's latest campus addition is the Georgia Cyber Center, designed to strengthen Georgia's position as a national leader in cybersecurity. Costing \$100 million and totaling 332,000 square feet in two adjacent buildings, the center is the single largest investment in a cybersecurity facility in the nation to date. It represents a unique public/private partnership that includes Augusta University, Augusta Technical College, the University System of Georgia's research institutions, the City of Augusta, the Georgia Bureau of Investigation, the Georgia Department of Defense, and other state, federal, and private-sector partners working together to meet workforce demand.

The center is an important and prominent addition to AU's Riverfront Campus, which is designated as a National Center of Academic Excellence in Cyber Defense. It houses the university's School of Computer

and Cyber Sciences and Cyber Institute. The center is also part of the growing cybersecurity corridor in Augusta, which is home to the U.S. Army Cyber Command and the Cyber School of Excellence at Fort Gordon.

The first of the two structures – the Hull McKnight Building – and the 340-seat auditorium opened July 10, 2018. The building is named in honor of two of Augusta’s most prominent business and community leaders. The center’s second structure, the Shaffer MacCartney building, opened in January, 2019.

The Christenberry Fieldhouse houses 11 of the Augusta Jaguars’ 13 competition sports. In addition to housing all administrative and support staff for the AU Department of Athletics, CFH is home to the College of Education’s Department of Kinesiology. The Forest Hills Campus, on which CFH is located, includes a full-size golf course and baseball, softball, and soccer fields and serves as the home of the Jaguars’ nationally recognized NCAA Division I golf team.

For more information, visit Augusta University at [www.augusta.edu](http://www.augusta.edu).

## **Augusta, Georgia**

One of the largest cities in Georgia, Augusta is located on the banks of the Savannah River midway between the Great Smokey Mountains and the Atlantic Ocean. A growing city with a metropolitan-area population of around 400,000, Augusta recently was ranked one of the most favorable places to live in Georgia.

The city offers a wide array of cultural, historical, and recreational activities. Museums, opera, theatre, ballet, concerts, historical sites, and professional sports are all available in Augusta.

Augusta is much more than a great place to live. Spearheaded by the next generation of musicians, foodies, artists, and entrepreneurs, the city comes to life at night, offering live music and theatrical performances and a wealth of eateries. Augusta is also home to some of the nation’s most beautiful lakes and trails.

The city is home to Fort Gordon, a large, multi-mission, multi-service military installation providing base services and support across a wide spectrum of training, operational and soldier sustainment needs. Among its regional and world-wide missions are military intelligence and cyber operations.

Major cities and favorite Southern destinations are only a short drive away: 1 hour to Columbia, S.C.; 2 hours to Atlanta, Ga.; 2.25 hours to Savannah, Ga., and 2.5 hours to Charleston, S.C.

***Augusta University is an AA/EEO/Equal Access/ADA Employer.***

## **Application and Nomination Process**

Confidential inquiries are welcomed, and nominations are invited.

**To apply, submit:** a) Letter of interest, b) Current resume, and c) At least five references familiar with applicant’s background with full contact and e-mail information (References will not be contacted without applicant’s consent.)

**Submit applications** to [AU-AVPGEP@myersmcræe.com](mailto:AU-AVPGEP@myersmcræe.com) by **April 15, 2019**, for best consideration. Applications will be accepted until the position is filled.

**Submit nominations** to [AU-AVPGEP-nominate@myersmcræe.com](mailto:AU-AVPGEP-nominate@myersmcræe.com) with full contact and e-mail information on nominee.

**Emily Parker Myers**, CEO, and **Jennifer Barfield**, Senior Vice President, of **Myers McRae Executive Search and Consulting** are assisting AU with this search.

**Myers McRae Executive Search and Consulting**

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