

Director of Planned Giving

This position is: OPEN

Job Number: 745 Posted: 9/20/2022 Revised: Location: St. Davids -- Posting Type: Staff

Position Summary

The Director of Planned Giving will be joining Eastern University during an exciting time of growth and transformation in its history. This reestablished position will be responsible for developing, promoting, coordinating, and administering an effective long-term legacy gift planning program to significantly enhance estate gifts to Eastern University. As we continue to flourish and plan for future campaigns, this position will engage and educate with donors to secure a reasonable number of legacy gifts annually.

Reporting to the Associate Vice President for Advancement, the Director of Planned Giving will work closely with internal partners, such as the Vice President for Advancement, Associate Vice President for Alumni and Family Engagement, Director of Annual Giving, Senior Director of Advancement Services, and others, to establish a pipeline of planned gift prospects, along with supporting other engagement officers to secure legacy gifts.

He/she will build, cultivate, and solicit a portfolio of 110 prospects that will make estate contributions toward scholarships, programs, facilities, and capital projects.

Eastern's current 11-member Advancement Office raises approximately \$3 million - \$5 million annually and is looking to increase this in the coming years, through grant proposals, documented legacy gifts, unrestricted gifts to the annual fund and strengthening of alumni engagement. The office has a collegial and collaborative ethos where staff communicate with one another and work together toward common goals. It is expected that the successful candidate will be a positive addition to the team.

Responsibilities

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- Develops and manages a comprehensive gift planning program that includes prospect visits, relationship management, education of engagement officer staff, College boards, and councils on gift planning basics.
- Manages a planned giving marketing or informational platform, including coordination of e-newsletters, emails, and mailings to select audiences.
- Coordinates all aspects and details of pending and completed planned gifts among the donor, the donor's advisors, the Advancement Office, the Finance Office, along with the President's Office and the University's legal counsel, as appropriate.
- Identifies, visits, cultivates, solicits, and stewards a portfolio of 110 prospects.
- Participate in regular prospect screening and strategy sessions with University Advancement and Alumni & Parent Engagement staff.
- Author and present written proposals appropriate to a prospect's interest and financial ability.
- As appropriate, assist and attend alumni or other University events.
- Maintains awareness of University fundraising priorities.
- Document all activities in the University Advancement CRM.
- Other duties as assigned by the supervisor.

- Travel is necessary to be successful in this position to support visits with prospects (alumni, parents, and friends) and to manage and participate in special events.
- Some evenings and weekend work are necessary for this position.
- This position is partially remote.

Knowledge, Skills, and Abilities

Strategic Thinking - Keeps the University's strategic objectives in mind when developing and contributing to plans and initiatives for Advancement and donor engagement. Is able to explain the link between program goals and the University's strategic direction to Advancement. Makes informed decisions based on a clear understanding of the impact and consequences involved. Considers key financial factors (e.g., budget, revenue, resources) when making decisions.

Adaptability - Stays focused on work and responsibilities in a changing work environment. Is able to quickly reprioritize to ensure resources (e.g., staff, systems, tools, etc.) are in place to achieve objectives. Responds positively and is supportive of change initiatives.

Communication and Networking - Articulates thoughts clearly and effectively. Consistently communicates to colleagues and/or supervisor ensuring that everybody is well informed. Proactively builds informal networks and uses them to drive results within the EU community.

Results Driven - Self-motivated and can work independently and collaboratively. Supports the continuous improvement of policies to reduce inefficiencies and better achieve goals. Respectfully holds people accountable for the quality of their work and minimal errors. Strives to achieve challenging goals and works through obstacles.

Qualifications

Minimum Requirements:

- Bachelor's degree required.
- 3 to 5 years of fundraising experience or relevant professional experience.
- The successful candidate will have at least a basic understanding of tax laws, especially related to charitable giving, revenue generation/fundraising techniques, endowment development in relationship to capital campaigns, leadership gift solicitation, and annual giving.
- Excellent oral and written communication skills are essential for interaction with University leadership, Advancement staff, support staff, academic leaders, university faculty and staff, alumni, volunteers, prospects, and donors; ability to prepare professional-looking documents.
- Ability to build, foster and maintain positive professional relationships.
- Exceptional interpersonal skills with the ability to build, foster and maintain positive professional relationships.
- Ability to work with a diverse range of individuals.
- Strong organizational and time management skills.
- Ability to be creative, engaging, adaptive, and resilient.
- Ability to handle confidential material with the utmost discretion.
- Technology and social media savvy.
- Travel is required, along with a willingness to work evenings and weekends, as needed.
- Strong commitment to cooperative teamwork.

Preferred Qualifications:

- Background in estate planning vehicles and tax codes related to planned giving and estate planning.

- Familiarity with and success in the complex environment of a faith-based university.
- Minimum of 2 years of successful professional experience in estate giving and securing estate gifts.
- Familiarity with The Raiser's Edge or similar fundraising/marketing software is a plus.
- Familiarity with planned giving marketing and information platforms.
- Experience in initiating and securing advancement visits.
- Strong Excel skills including filtering and formulas.

About Eastern University

Eastern University is a Christian university of the arts and sciences that integrates faith, reason and justice for students in its undergraduate, graduate, Seminary, urban, professional and international programs. **Applicants should have a religious commitment compatible with its mission and be willing to support the mission and vision of the university.** The university complies with federal and state guidelines of nondiscrimination in employment; members of protected classes encouraged to apply.

Background Checks

Standard University employees are required to complete the background clearance process. Employment is contingent upon the successful results of an employment background screening. The employment background screening may include but is not limited to your consumer credit history (for positions that work with the university finances or alumni funds only), verification of education and professional credentials, criminal history, driving history, residency, immigration status, performance, references, and other qualities pertinent to your qualifications for the following position.

Youth Clearances are required for positions with direct contact with children and essential personnel positions. Employees working with or around minor age children are required to complete the youth clearance process which includes the following four child protection clearances:

- 1) Affidavit;
- 2) FBI Criminal Record Check;
- 3) Pennsylvania Department of Human Services Child Abuse History Clearance and;
- 4) Pennsylvania State Police Criminal Record Check.

In accordance with state laws, Act 73 of 2007, Act 153 of 2014, Act 168 (relating to the Child Protective Services Law), school employees of Eastern University who will have "direct contact with children" must complete the background check process prior to employment. Results must be submitted within ten days of receipt.

Description Disclaimer

This description is intended to describe the general level and nature of work performed by the person/people assigned to this position. It is not to be construed as an exhaustive list of duties and responsibilities of the person/people so assigned.