

Senior Director of Development & Planned Giving

This position is: OPEN

Job Number: 787 **Posted: 1/24/2023** **Revised:** **Location:** St. Davids -- **Posting Type:** Staff

Position Summary

This new role of Senior Director of Development & Planned Giving will be joining Eastern University during an exciting time of growth and transformation in its history as we embark on our new 2022-27 strategic plan titled, Inspire. Innovate. Impact. This position is responsible for providing strategic and operational leadership of major, leadership, and annual gift operations, supervision of professional staff in those areas, and cultivating and soliciting a portfolio of donors and prospects. As we continue to develop and plan for future campaigns, this position will play an important role in our overall engagement and fundraising success.

Reporting to the Associate Vice President for Advancement, the Senior Director will work closely with internal partners, such as the Vice President for Advancement, Academic Leaders, Senior Director of Advancement Services, Senior Director of Alumni & Family Engagement, and others, to support the development of a culture of philanthropy with the Eastern community both internally and externally, by showing need, impact, and fostering pathways for philanthropic support to the University and its programs through major and planned gifts.

He/she will build, cultivate, and solicit a portfolio of approximately 75 donors and prospects who may wish to contribute to the University through a major gift or estate gift commitment toward scholarships, programs, 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 alumni and family engagement. The office has a collegial and collaborative ethos where staff communicate with one another and work together toward common goals. The successful candidate is expected to be a positive addition to the team.

Responsibilities

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Advancement

- Build and manage a portfolio of approximately 75 major gift or planned gift prospects, including all areas of the relationship development cycle from identifying, cultivating, soliciting, and stewarding prospects.
- Partner with the Senior Director of Alumni & Family Engagement and Director of Leadership Gifts & Digital/Direct Marketing to identify major and principal level prospects.
- As needed, prepare written proposals to solicit prospects for gifts in support of the University.
- Responds to all constituency outreach in a timely, kind, helpful, and appropriate manner.
- Establish close working relationships with other Senior Directors in the division to ensure that all aspects of the fundraising, data, and engagement activities are well-coordinated with all areas of the Advancement division.

- Assist with and attend Advancement/Alumni & Family related events; attend other University events, as appropriate.
- Maintain awareness of University fundraising priorities.
- Document all activities in the University Advancement CRM.
- Perform other related duties as required. All specific projects or responsibilities are subject to change and may shift at any time due to evolving institutional priorities, staffing transitions, or other reasons.

Strategic and Operational

- In support of the University's strategic plan and priorities, provides leadership and oversight of all aspects of major, leadership, and annual gift operations, including work with direct reports to strategize and implement plans that focus resources (time, energy, finances) toward achieving stated goals and soliciting alumni, families, faculty, staff, foundations, grants, corporations, etc., work with AVP and Senior Director of Advancement Services on portfolio management. Using critical thinking skills, identify and work with multiple collaborators and stakeholders to vet decisions, secure buy-in, and adjust plans if needed.
- Develop and manage a comprehensive gift planning program that includes prospect visits, relationship management, and education of engagement officers on gift planning basics. This plan should include marketing planned giving to selected audiences through digital and direct marketing.
- Coordinates all aspects and details of pending and completed planned gifts among the donor, the donor's advisors, the Advancement Office, and the Finance Office.
- As needed or requested, prepare reports and analyze data to identify trends and patterns, re-evaluate strategies and make recommendations.
- Effectively manages projects and resources, directing program improvement and standardizing office systems and procedures to accomplish projects and tasks.
- Participate in regular prospect screening and strategy sessions with Advancement Division members.

Management

- Manage three (3) professional staff. Set and manage meaningful performance objectives to foster ongoing growth for direct reports. Document performance and promote professional development opportunities while holding staff accountable to position and performance expectations.
- Manages, maintains, and effectively stewards the departmental budget.

Status

- Travel is necessary to be successful in this position to support visits to assigned prospects and to manage and participate in special events.
- Some evenings and weekend work are necessary for this position.
- This position is partially remote following the satisfactory completion of the 90-day review.
- The work location/hours and use of accrued time off (annual leave, sick, personal, etc.) will follow that of the University and Office of Advancement's policies and procedures.

Qualifications

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.

Minimum Requirements:

- Bachelor's degree required.
- Four (4) years or more experience in major gift, leadership gift fundraising, or relevant professional experience, with proven ability to close five-figure donations or above.
- Proven record of leadership, management, and supervisory skills.
- Experience initiating and securing alumni or advancement visits and successfully asking and securing philanthropic gifts.
- Excellent writing, communication, proofreading, editing, and organizational skills. This is also essential for interaction with University leadership, Advancement staff, support staff, academic leaders, university faculty and staff, alumni, volunteers, prospects, and donors.
- Experience developing marketing programs to support major and planned gift and stewardship events at a university, not-for-profit institution, or other large-scale institution of size and complexity.
- Exceptional interpersonal skills with the ability to build, foster, and maintain positive professional relationships with colleagues and other constituencies.
- Strong organizational and time management skills focused on details and meeting deadlines. Calendar driven.
- Ability to work independently and as a team, to prioritize work efficiently, and to meet deadlines while maintaining a positive attitude.
- Ability to work with a diverse range of individuals in a fast-paced environment.
- Ability to be creative, engaging, adaptive, and resilient.
- Ability to handle confidential material and situations with sensitivity, tact, and the utmost discretion.
- Ability to carry out multiple activities/projects concurrently is expected.

- 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

- At least a basic understanding of tax laws, especially related to charitable giving, revenue generation/fundraising techniques, endowment development related to capital campaigns, leadership gift solicitation, and annual giving.
- 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.
- Knowledge of the functions of a comprehensive fundraising and engagement program.
- Familiarity with The Raiser's Edge or similar fundraising/marketing software is a plus.
- 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.