



Position Description

TITLE: DIRECTOR OF PLANNED GIVING

LOCATION: Nathaniel Gilman House

REPORTS TO: Director of Major Gifts

HOURS: 37.5 hours per week, Monday - Friday, 8:30 a.m. to 5:00 p.m. Additional hours may be required as necessary.

CLASSIFICATION: Exempt, Administrator

FUNCTION: The Director plans, organizes and implements the Planned Giving operation. The Director’s responsibility is to establish and manage a comprehensive marketing, solicitation, and stewardship effort for all deferred gifts, and to coordinate the work of the Class based Planned Giving Chairs. In addition, the Director of Planned Giving will be responsible for a geographic region of major gifts prospects. Travel is required as well as occasional evening and weekend work.

ESSENTIAL DUTIES:

- Direct the day-to-day operations of the Academy’s planned giving effort and actively manage a portfolio of major gift prospects within a specified geographic region.
- Establish and manage a comprehensive marketing, solicitation, and stewardship effort for all deferred gifts.
- Prepare planned giving proposals for prospective donors and provide appropriate fund management information to participants.
- Coordinate the work of the Class based Planned Giving Chairs and maintain bequest expectancies and appropriate donor recognition clubs.
- Work with the regional directors of major gifts to integrate planned gift vehicles into major solicitations where appropriate.
- Travel to off campus locations to engage in personal and group visits in order to identify, cultivate, solicit and steward outright and deferred gift top prospects.
- Supervise the office personnel and files.
- Perform additional duties as necessary.

QUALIFICATIONS: **Education/Training:** Bachelor’s Degree and advanced degree or equivalent experience in a related field of finance, law, or tax is preferred. Valid driver’s license required.

Experience: Demonstrated experience in fundraising, preferably in a private secondary school or college is highly desired. Must have experience with computer programs including MS Office, email and Internet. Knowledge of planned giving instruments essential. The successful candidate will possess a high degree of interpersonal skills including persuasive and motivational ability, excellent written and oral communication skills and financial acumen.

Physical Demands: To perform the essential functions of the job, the following applies: requires standing, stretching, bending, walking, lifting and transporting a minimum of 25 lbs. Must be able to climb stairs. Must be physically and mentally capable of performing multiple tasks under extended heavy pressure and be able to function in a fast-paced environment. Must be capable of using a visual display terminal with continuous wrist movement on a keyboard.

DATE: July 2011