

St. Peter's University**Position Description**

Position/Job Title:	Director of Planned Giving
Division/Department:	Advancement and External Affairs
Reports to/Title:	Assistant Vice President for Individual Giving

Summary Description:

The Director of Planned Giving will be responsible for managing all aspects of the Planned Giving program. This involves being the resident expert on planned giving vehicles, educating Advancement colleagues and donors alike, creating and directing PG marketing strategies, and developing and implementing prospect-specific strategies to qualify, cultivate, solicit, steward and recognize major and planned giving prospects through individual visits, personal communication, event participation and volunteer activities. The Director of Planned Giving is also responsible for securing leadership level cash gifts. The Director of Planned Giving reports to the Assistant Vice President for Individual Giving.

Duties and Responsibilities:

- Oversees and directs the Pavonia Heritage Society program to increase financial support to the University by means of planned. Such gifts include but are not limited to bequests, trusts, stock, gift annuities, life insurance policies and real property. It is expected that cash gifts be maximized from prospects while promoting planned giving vehicles.
- Actively develop, implement and execute planned and leadership giving strategies for a portfolio of 150-200 prospects through the qualification, cultivation, solicitation and stewardship of individuals.
- Meets with prospective donors and their advisors to: provide general information on estate planning; develop the prospect's interest and commitment; determine the feasibility of various contribution options; and ensure that arrangements are properly executed.
- Expected to personally/virtually visit with a minimum of 8-10 planned and leadership prospects per month and to meet an annual revenue goal that includes both planned and cash leadership level gifts.
- Assists other frontline fundraisers with planned giving discussions and donor presentations serving as a resource and providing formal training on planned giving topics.
- Markets planned gifts through direct mail, quarterly electronic planned giving newsletter, University Magazine, seminars/webinars, and marketing collateral.
- Administers and monitors bequest donations, charitable gift annuities, and other deferred giving vehicles.
- Maintains good relations with the Office of Finance, Legal Counsel, and with allied professionals.

- Monitors changes in state and federal law which affect gift planning and monitors state registrations.
- Administers budget for Planned Giving program.
- Oversees the University's Charitable Gift Annuity Program.
- Performs other related duties as assigned by the Assistant Vice President for Individual Giving and/or Vice President for Advancement and External Affairs.

Qualification Standards:

Because of the nature of the position, certain personal qualities are key to the success of the individual in this role. They include:

- Outcomes-oriented work style.
- Optimistic and empowered attitude.
- Entrepreneurial mind set.
- Unparalleled personal integrity and respect for confidentiality, prudence and discretion.
- Ability to inspire and engender a passion for Saint Peter's University and the Jesuit mission.
- Strong oral and written communication skills.

Education:

A Bachelor's degree is required with a Master's degree preferred.

Experience:

- Minimum of 6-8 years of professional development experience encompassing the full range of fundraising activities in a senior development position that includes familiarity with estate administration and estate planning.
- Demonstrated success in cultivating and soliciting gifts, or a demonstrated track record of closing complex agreements including interaction with high level benefactors.
- Capital campaign experience is a plus.
- Knowledge of the Raiser's Edge software is a plus.

The salary range for this role is \$85,000-\$95,000. Saint Peter's offer an excellent benefits package which can be shared upon request.

Mission Advantage Recruiting has been retained to conduct this search. Please inquire with:

Caleb Fitzgerald | cfitzgerald@missionadv.org | 629.900.7276