

JOB DESCRIPTION

POSITION TITLE: Director - Planned Giving

SUPERVISED BY: Vice President - Advancement

SUPERVISES: Associate Director - Planned Giving
Administrative Assistant - Planned Giving

PURPOSE OF POSITION: To lead and grow the Planned Giving Program to support the youth programs and operations of the Agency by building relationships with donors so that they will deepen their support of our Home through donations of charitable gift annuities, wills/living trusts, securities, remainder and lead trusts, real estate, life insurance, etc. To market such gifts to the general donor file and specifically to targeted audiences through direct mail efforts. To manage, develop/train and supervise all staff required to meet the Planned Giving and Advancement Department needs.

ESSENTIAL QUALIFICATIONS:

- Bachelor's degree. Master's or J.D. degree preferred.
- Eight to ten years in planned giving fundraising or related field (i.e., trusts, wealth management)
- Proven fund-raising, leadership and consensus building skills. Proven negotiation and mediation skills.
- Specialized knowledge related to planned gift instruments and fund-raising.
- Able to balance competing priorities, complex situations and tight deadlines.
- Excellent written, verbal, interpersonal, and presentation skills. Ability to incorporate active listening skills in order to build relationships with donors.
- Ability to supervise and develop staff and work collaboratively with other teams.
- Ability to develop and execute an effective business plan for the division.
- Demonstrated success in creating and implementing a planned giving marketing program.
- Demonstrated success in personal solicitation of five to seven figure planned gifts.
- A willingness and aptitude to support major gift fundraising efforts.
- Excellent knowledge of the scope of programs at Mercy Home for Boys & Girls.
- Ability to travel on local and out-of-town donor visits and receptions.
- Valid drivers' license and ability to drive a car.
- Proficiency in PC systems, as well as the ability to become proficient in other software packages and programs as necessary.
- Strong organizational skills and ability to manage multiple projects.
- Self-starter in a team atmosphere.
- Ability to maintain confidentiality.
- Maturity and sensitivity to cultural and individual differences.
- Commitment to the mission, values, and goals of the Agency.

ESSENTIAL FUNCTIONS:

- Develop long-range income plans and strategies to meet the financial plans of the Agency.
- Explore strategies to enlarge the Agency's endowment by deferred giving techniques.
- Analyze donor-giving patterns and formulate appropriate marketing and solicitation plans.
- Develop strategies and approaches to generate ever-higher levels of giving.
- Lead and manage the planned giving division including budgeting, program direction, supervision and evaluation of assigned staff.
- Hire, train, develop and hold regular supervisory meetings and conduct timely performance reviews for staff in Planned Giving and train affiliated co-workers in Agency Advancement in planned giving techniques.
- Oversee the success of the gift annuity and bequest program.
- Visit donors who show promise of larger gifts in coordination with VP and Directors in Advancement.
- Create strategies to market planned giving opportunities to donors.
- Write and develop promotional materials such as brochures and reports.

- Develop articles and ads on planned giving for "The Waifs' Messenger" and other periodicals.
- Ensure that all deferred giving activities be conducted in compliance with applicable laws governing tax-exempt institutions.
- Organize and participate in appropriate initiatives to promote the Agency.
- Ensure that all planned giving donors receive appropriate, consistent recognition and an accounting of the impact that their gift has on the Agency, as appropriate.
- Act as goodwill ambassador of Agency, as required.
- Develop, in collaboration with leadership, innovative recognition opportunities and materials and events for continuity and donor stewardship.
- Forge relationships with donors and sows the seeds for direct mail donors to perpetuate their giving through planned gifts.
- Performs other related duties as assigned

RECEIPT AND ACKNOWLEDGMENT:

I acknowledge and understand that:

- Receipt of the job description does not imply nor create a promise of employment, nor an employment contract of any kind, and that my employment is at-will.
- The job description provides a general summary of the position in which I am employed, that the contents of this job description are job requirements and, at this time, I know of no limitations which would prevent me from performing these functions with or without accommodation. I further understand that it is my responsibility to inform my supervisor at any time that I am unable to perform these functions.
- This job description in no way states or implies that these are the only duties to be performed by the jobholder. Job duties, tasks, work hours and work requirements may be changed at any time.
- Acceptable job performance includes completion of the job responsibilities as well as compliance with the policies, procedures, rules and regulations of the Agency.
- I have read and understand this job description.

This job description was agreed to by:

Director - Planned Giving

Date

Mercy Home for Boys & Girls (The Mission of Our Lady of Mercy, Inc.) is a non-profit Illinois Corporation and an equal opportunity employer.