

Director of Planned Giving  
Office of External Affairs and Development

Summary

The Director of Planned Giving is a member of the senior team responsible for the overall fundraising plan for the institution and for building and strengthening core fundraising services.

Reporting to the Director of Institutional Advancement, the incumbent is responsible for leading the pan-institutional Planned Giving Program, including the establishment and implementation of all of the Planned Giving strategic plans, policies, and goals.

Major Duties

Key responsibilities include:

- Developing strategies for identification, cultivation, and solicitation of Planned Giving prospects;
- Actively managing a portfolio of Planned Giving prospects and donors for cultivation, solicitation, and stewardship;
- Coordinating Planned Giving activities of Development Officers in all business units;
- Evaluating the effectiveness of all Planned Giving initiatives and activities across the institution;
- Mentoring staff and providing training as required;
- Developing strategies to aggressively market the Planned Giving program; and
- Lead and steward the Legacy Society, the institution's corps of identified Planned Giving donors.

Skills and Abilities

- Goal orientation with a high level of energy, enthusiasm and dedication to the mission and goals of the Institution.
- Demonstrated management experience for the successful leadership and mentoring of professional and support staff.
- Ability to effectively plan, focus and execute to bring improvement to current ways of doing things.
- Exceptional interpersonal skills with the ability and personality to work collaboratively, accept responsibility, and motivate colleagues, volunteers, and donors.
- Ability to organize fundraising activities effectively, prioritize prospects, and participate in high-level gift discussions.
- Experience in securing outright, major gifts.
- Excellent written and oral communication skills.
- Strong leadership, delegation, and teaming skills.
- Sound judgment and integrity.
- Willingness to try new approaches and take appropriate risks.
- A minimum of seven to ten years professional experience in Development, preferably within a university or other complex not-for-profit environment.

Supervisory Controls

The Director of Institutional Advancement provides broad goals, objectives, budget and priorities. Incumbent independently plans, designs, implements, and evaluates the overall program, determining methods and approaches to be used. Work is evaluated in terms of results achieved and objectives met.