



CARROLL UNIVERSITY

Job Description

Position: Assistant Director of Gift Planning (New Position)

Classification: Administrative Staff- Full Time- 12 Month- 2080 Hours

Reports To: Director of Gift Planning

Summary: In this newly created position, the inaugural Assistant Director of Gift Planning is responsible for the development and implementation of strategies for the solicitation of major gifts, including outright and deferred/planned gifts. The Assistant Director will manage a portfolio of at least 150-175 rated prospects that have the capacity and inclination to make a gift of \$25,000 or more to support a wide range of university initiatives.

In addition to managing a portfolio of donors, the Assistant Director will regularly collaborate with the development team's front-line fundraisers to further promote, solicit, and document bequest intentions, IRA rollover gifts, gifts of stock, mutual funds, and other blended gifts.

The Assistant Director must be a careful listener who can share basic gift planning concepts in face-to-face or telephone conversations, group presentations, written proposals, and marketing materials. We seek an energetic and enthusiastic professional looking to join a team dedicated to achieving ambitious goals.

Responsibilities:

- Serve as the gift planning lead for life-income gift program, i.e., the marketing of gift annuities, the delivery and execution of all documents required to complete each annuity agreement and the delivery of all annuity payments and annual tax reporting documents.
- Assist and consult with other staff in communicating planned giving opportunities.
- Direct and manage stewardship activities pertaining to the John Adams Savage Legacy Society in collaboration with the Director of Stewardship and Donor Relations, event staff, and the Director of Gift Planning
- Track mature estate expectancies to ensure the preservation and timely distribution of all estate gifts to Carroll.
- Serve as fundraising lead on the 50th Reunion. This will include joining and leading the fundraising portions of committee meetings, working with and strategizing on higher level donors, and developing reunion marketing materials and strategies that integrate gift planning.

- Work collaboratively to support front-line fundraisers to share gift planning knowledge to increase gifts of IRA rollovers, gifts of stocks, mutual funds, and other blended gifts.
- Work directly with donors to craft personalized giving strategies, providing individual planned gift illustrations
- Develop a working knowledge of Carroll University in general and funding priorities specifically so as to articulate a compelling case for support to all constituents.
- Manage a sufficient prospect portfolio of alumni, friends, parents and faculty to generate a minimum of 10-12 prospect visits per month that will lead to the growth in the number of completed major and planned gift solicitations and gifts closed. Strategically schedule prospect visits to use time efficiently and effectively with approximately 35% of time spent out of the office on visits (some regional and national travel required).
- Provide timely stewardship of assigned prospects and donors.
- Provide staff support for appropriate university officials for the purposes of prospect cultivation, solicitation and stewardship as needed.
- Communicate closely with the appropriate staff regarding information pertaining to major and planned gift prospects, including contact/action reports, proposal generation, planned gift documentation, gift acknowledgements and other data important for the preservation of donor/prospect records.
- Participate in development activities, such as capital campaigns, events, donor briefings, committee meetings, and volunteer activities, as needed and appropriate.
- Assist with the successful development and implementation of Institutional Advancement events, including but not limited to, homecoming, reunion, donor functions (luncheons/dinners, etc.) and athletic events, that can be utilized for cultivation and/or stewardship activities for prospects and donors.
- Perform other duties as requested, delegated or assigned.

Qualifications:

Education and/or Experience:

- Bachelor's degree required
- Minimum of two to four years of experience, preferably in higher education or equivalent experience in a related field
- Working knowledge of planned and deferred giving vehicles strongly preferred
- Ability to make "cold calls" via phone for prospect discovery and cultivation
- Ability to manage stress with multiple competing priorities while maintaining a positive attitude and affect.
- Demonstrated successful track record in the cultivation, solicitation and stewardship of major and planned gifts (\$25,000 and above) is preferred
- Knowledge of development data systems (RE NXT preferred)

Additional Knowledge, Skills and Abilities:

- Ability to clearly articulate the mission of Carroll University.
- Strong interpersonal and organizational skills and aptitude to work with people of different ages and temperaments.
- Superior written and oral communication skills.
- High energy level, self-motivated, and self-directed to design and complete complex projects.

- Must have the skills and/or ability to: multi-task and meet deadlines; be a team player; work collaboratively; understand the principles and techniques relevant to major gift fundraising in higher education; and participate in evening and weekend activities as necessary.
- Demonstration of integrity, positive attitude, diplomacy, tact, courtesy and a sense of humor.
- Knowledge of Microsoft Windows, Excel, Word, and Power Point.
- Candidates must be willing and able to support and advance the University mission.