

**JOB TITLE:** Planned Giving Officer  
**MINISTRY TEAM:** OPTIC/Development  
**REPORTS TO:** Director of Philanthropy  
**FLSA STATUS:**  
**APPROVED BY:**  
**APPROVAL DATE:**

**GENERAL PURPOSE OF POSITION:** The Planned Giving Officer serves as a member of the Development team to meet the financial and strategic goals of the financial development programs of the national ministries of the United Church of Christ. The PGO builds donor relationships, secures legacy and deferred gifts and current endowment gifts and grows the financial sustainability of the United Church of Christ national setting. The PGO demonstrates knowledge of estates, trusts, and other financial tools for legacy giving. Planned gift solicitations are a part of the Development Teams fundraising and strategic goals.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:**

- Maintain a portfolio of leadership gift prospects (individual and congregational). Nurture prospective donors; interpret to them the mission and various ministries of the United Church of Christ; and consult with these donors and their advisors regarding support of the UCC through leadership gifts. Meet with 15-20 planned giving prospects per month and take strategic steps to move them through the gift cycle of identification, qualification, cultivation, solicitation and stewardship. Solicit gifts as assigned.
- Focus 90% of time on identification of prospects and 10% on stewardship of donors who have already made a gift commitment.
- Prepare and implement meaningful personal solicitations that align with donor interests and the UCC's needs and strategic vision.
- Provide leadership in the development of cases for support and their expressions. Collaborate with the staff other church leaders as they identify needs and prepare compelling cases for giving.
- Assist in the preparation and editing of publications for planned giving. This includes donor recognition in marketing materials.
- Respond to inquiries for information and resources as requested by Conferences, congregations and individuals.
- Work collaboratively with gift officers (MGO) and leaders throughout the national setting to appropriately cultivate and steward donors.
- Develop a thorough understanding of national UCC programs and ministries.
- Contribute to the work environment that encourages knowledge of, respect for, and development of skills to engage with those of various cultures and backgrounds.
- Researching potential donors.
- Contribute to the overall success of the Financial Development Team by performing

other duties as assigned.

**MINIMUM QUALIFICATIONS:** The requirements listed below are representative of knowledge, skills and/or abilities required to perform successfully in this position.

- A college degree in a related field or equivalent experience, or a combination of academic study and experience.
- Experience in the philosophy and practice of financial development in non-profit sector and demonstrated ability to work in the area of planned giving.
- Demonstrated ability in the development and the securing of gifts.
- Commitment to and theological understanding of mission, stewardship and fundraising; ability to articulate and witness to one's faith perspective.
- Understanding of the polity and structures of the United Church of Christ.
- Desire and sensitivity to work in diverse racial, ethnic, cultural and religious settings with commitment to diversity in the workplace as well as in one's understanding of mission.
- Demonstrated ability to work collaboratively and collegially as well as independently.
- Demonstrated written and oral English language skills, including ability to conceptualize and develop print resources; public speaking skills and knowledge of a second language when applicable.
- Computer literate in word processing.
- Demonstrated administrative skills.
- Competency in leadership planning, development and training.
- Ability to travel extensively within the United States as necessary.

This job description is not intended to be a complete list of all duties and responsibilities required for the position and are subject to review and change at any time in accordance with the needs of the ministry. Since no job description can detail all duties and responsibilities that may be required from time to time in the performance of a position, duties and responsibilities that may be inherent in a position shall also be considered part of the position holder's responsibility.

It is expected that the person who holds this position will conduct themselves in a manner consistent with the policies of the UCC and in a manner that will reflect positively on the organization. All staff are encouraged to nurture safety within the work performed on behalf of the UCC by being attentive to self-care, education, maintaining appropriate boundaries, and the importance of referring those in need to supportive and helpful resources.