



**Associate Director of Planned Giving (full-time, 35 hours/week)
University Advancement-Planned Giving
Position 102087**

Position Summary: The Associate Director of Planned Giving will work together with the Director of Planned giving in the planning and execution of fundraising initiatives to help grow the planned giving donor base in support of the mission of the university. This position will identify, cultivate, solicit, and close planned and major gifts from prospective donors. It will also promote strategies for blended gift concepts as they arise in conjunction with prospective donors, major gift officers, and university leadership.

Essential Responsibilities Include: Build, grow, and manage a portfolio of planned and major gift prospects based on new and past donors at the \$100,000+ level. Development (in conjunction with the director of planned giving) of an annual work plan with goals for number of prospects, number of planned gifts, and number of prospect visits sufficient to meet established fundraising targets. Develop prospect strategies, cultivate and solicit prospects through personal visits and written communication; exceeding an annual goal of at least 50 face-to-face unique donor visits. Write proposals, solicitation letters, acknowledgments, and other development materials for prospects and donors. Knowledgeable and capable of articulating and writing about the value of various planned giving vehicles with prospects/donors -- as well as with other members of the advancement team. Provide assistance to prospective donors and/or major gift officers seeking advice, counsel, and planned giving materials. Run, analyze, and explain concepts of various planned giving illustrations (using PG Calc software) to help provide the best application of planned gift donor strategies for advancement colleagues, academic partners, and prospective donors. Plan and coordinate all planned giving events and mailings including: planned giving advisory group meetings, and spring and fall cultivation events. Write cover stories for quarterly planned giving newsletter and email blast solicitations. Manage survey responses and track data provided by Stelter on email blast activity.

Direct and manage planned giving website: work closely with director to keep fresh and attractive, incorporate meaningful donor testimonials and videos. Ability to train others on the development team on how to use the site in order to benefit their visits/calls. Assist with management of incoming estates: meet filing deadlines, make follow up calls to attorneys/executors, maintain up-to-date spreadsheet reflecting current status of estate and next steps. Responsible for managing all in-kind donations relating to estates or potential planned giving donors. Provide materials for donor, work with campus recipients, coordinate completion of IRS (Form 8283) by donor and CFO of Finance.

Minimum Qualifications: A Bachelor's Degree is required. A minimum of at least 7 years of professional development and/or estate planning experience, with 3 of those years reflecting successful solicitation and closure of major and planned gifts. Experience with blended major and planned gift concepts is preferred. Knowledge of financial planning is a plus. The associate director of planned giving must be a highly energetic professional with a track record of building relationships and closing gifts above \$100,000. The successful candidate will possess the ability to work in an environment that puts a strong emphasis on metrics, blended major and planned gift concepts, and the capability to work independently and as part of a team.

Must have excellent oral, writing, proof-reading and editing skills. Experience in promoting donor relations and stewardship. Ability to prioritize work and be a self-starter; manage and analyze projects; determine priorities and maintain a high degree of professionalism and confidentiality. Complete proficiency in Microsoft Office, including *Word*, *Excel*, *PowerPoint* and *Google Docs*. Familiarity with Millennium (alumni and donor database software), PGCalc (or other planned giving software) will be viewed as advantageous.

Candidates meeting the above requirements, who also have the ability and willingness to travel, work occasional evenings and weekend hours, are encouraged to apply.

Possession of a current and valid U.S. driver's license appropriate to the type of university vehicle and an acceptable Motor Vehicle Driving Record (MVR) as stipulated in the Vehicle Guidelines and Procedures Manual administered through the office of Environmental Health and Safety. Annual clearance of MVR check through the Office of Environmental Health and Safety.

The ability to drive a vehicle (campus or non-campus) on behalf of university business. Ability to work independently, under deadlines, without close supervision, self-directed in the initiation, coordination and completion of tasks, acute attention to detail. Excellent relationship building and volunteer engagement skills, ability to work effectively with internal and external constituencies, including individuals of significant influence and affluence.

How to apply: forward application, resume, and cover letter with salary requirements as an attachment to (salary expectations are considered part of application process): CUARecruitment@cua.edu. Reference position 102087 in subject line of email. Please do not include photos on resumes and save documents with first/last names. All applicants must be supportive of the mission and vision of *The Catholic University of America*. Open until filled.

THE CATHOLIC UNIVERSITY OF AMERICA

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